

How to hire a virtual assistant

Understand what to look for, what to ask, and how to spot a great fit from the start.

takemytasks

Table of contents

Introduction 01

Step 1: Identify what's holding you back & how to delegate it 02

Step 2: Define the role you're hiring for 06

Step 3: Where to find the right VA 09

Step 4: Interviewing with purpose 10

Step 5: Making the hire 11

What's next? 12



takemytasks

Introduction

If you're reading this, there's a good chance you're at capacity. Your calendar is full, your inbox is overflowing, and you know you need help, but hiring the right help feels daunting.

You might have tried outsourcing before and had mixed results. Or **maybe this is your first time hiring a virtual assistant**, and you want to make sure you get it right.

At **takemytasks**, we've seen firsthand how transformative the right VA can be—not just for your productivity, but for your peace of mind. But that impact only happens when the hiring process is intentional, structured, and focused on fit.

This guide is here to help you

- → Identify what kind of support you actually need.
- → Translate that into a clear, structured role.
- → Avoid common hiring traps and mismatches.
- → Find a VA who's not just capable, but genuinely aligned with your way of working.

Hiring a VA isn't just a to-do on your list. It's a strategic decision. And when done right, it opens up space for you to grow, lead, and finally stop doing everything yourself.

Happy hiring,

Shane & Gav.

Our Founders



Step 1: Identify what's holding you back & how to delegate it

Define what success looks like before you delegate a single task.

If you've come across **Dan Martell's Buy Back Your Time,** you'll know the importance of categorizing tasks by the value they create. We think it's the perfect place to start when figuring out where a virtual assistant can make the biggest difference in your business.



The premise is simple: if you're spending time on tasks that drain your energy and don't require your expertise, you're capping your growth. The cost of outsourcing is often far lower than the opportunity cost of doing everything yourself.

Instead of dollar signs, let's think in terms of leverage:

- **Low-leverage tasks:** Repetitive work that keeps the lights on but doesn't drive momentum

  Examples: **Inbox triage, data entry, calendar scheduling.**

- **Support-level tasks:** Useful and necessary, but not the best use of your time

  Examples: **Social media formatting, admin coordination, content uploads.**

- **Skilled tasks:** Require expertise or strategic input

  Examples: **Sales conversations, system design, client proposals.**

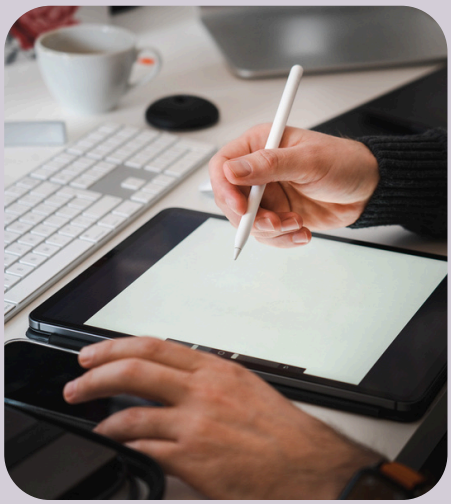
- **High-leverage tasks:** The work only you can do

  Examples: **Vision setting, partnerships, product development.**

Your goal: Delegate as many low-leverage and support-level tasks as possible so you can focus on the work that moves your business forward.



How to spot the right tasks to delegate





Before you define the role, you need to zoom out and understand how your time is really being spent.

Try this simple four-part process:

Step 1: Track your time
Use a time-tracking tool (like Toggl or Clockify) to log your activities for a full week.

Step 2: Analyze your time usage
Where are your hours going? What's recurring? What feels draining? Highlight the tasks that interrupt deep focus or get pushed to the end of your day.

Step 3: Categorize your tasks using the Task Value Ladder
Are you stuck doing low-leverage tasks when you should be in high-leverage work? Be honest with yourself here—it's where the clarity begins.

Step 4: Build a delegation plan
List all the tasks that:

- → Are repeated weekly or monthly
- → Don't require your strategic input
- → Could be documented with clear steps

These are perfect candidates for your VA.

Scenario

Sarah, a business coach, **was spending three hours** every morning clearing her inbox. Sales follow-ups were slipping, and leads were going cold. She mapped her task load, realized inbox management was **low-leverage, and delegated it to a VA**. Within weeks, she refocused on re-engaging leads—and boosted monthly revenue by 40%.



Want to go deeper?

Our free Task Leverage Planner includes:

- A printable time audit worksheet
- A task delegation decision tree
- Real-world examples and prompts

Download the planner
if you want a hands-on tool to walk through this step.

Once you've completed this section, you'll be ready to define the exact role you're hiring for.

Step 2: Define the role you're hiring for

Now that you've identified the tasks that are holding you back, it's time to shape them into a structured role.

Start by thinking broadly:

- Is this an admin assistant? A marketing VA? A sales coordinator?
- Will they be part-time or full-time? Dedicated or shared?
- What systems will they need to know (or be trained on)?



Rather than jumping straight into a job description, we recommend starting with a **dream task list.**

What's realistic and what's aspirational?



Use these prompts to jog your thinking and surface the tasks you'd love to let go of:

- What do you wish you didn't have to do each week?
- What tasks do you always procrastinate on?
- Are there any processes that could be handed off with clear steps?
- What tools do you currently use for admin, marketing, or communication?

Once you've brainstormed those tasks, use the table below to start prioritizing what to delegate. This helps you understand what to hand off now and what could follow later with training or SOPs.

Task delegation planner

Task	Frequency	Time spent	Tools Needed	Priority to Delegate (High/Medium/Low)
Example: Email triage	Daily	1.5 hrs/day	Gmail, Slack	High
Example: Client onboarding admin	Weekly	3 hrs/week	ClickUp, GDrive	Medium

This becomes the foundation of your role description—and helps ensure we match you with someone whose strengths align with your real needs.

Task delegation planner

Task	Frequency	Time spent	Tools Needed	Priority to Delegate (High/Medium/Low)

Step 3: Where to find the right VA

There are plenty of ways to hire a VA—freelance platforms, job boards, even referrals from peers. But when you're looking for someone to become a core part of your business, speed and price alone won't get you the outcome you need.

We hope you'll consider working with takemytasks—not just because it's easier, but because it's safer and more effective in the long run. We're not here to fill seats. We're here to find the right person for your team, and support both of you through every step of the journey.

Here's how we do it:

- **Book a consultation:** Tell us where you're stuck and what needs doing.
- **Get a curated shortlist :** We hand-pick candidates who fit your needs, tools, and communication style.
- **Interview and decide:** Meet your top matches and choose the VA who clicks.
- **Onboard and launch:** We handle the setup, access, and training so they can hit the ground running.
- **Stay supported:** We stay involved with regular check-ins to make sure things stay on track.

Our clients often tell us they wish they'd skipped the freelance marketplaces and come straight to us. When the process is handled properly from the start, your VA doesn't just save you time, they become one of your biggest growth assets.



Step 4: Interviewing with purpose



Now we're getting to the interviews. You've probably interviewed before—but this might be the first time you're doing it remotely, or for a role like this. And when your candidate may be international, across time zones, and working asynchronously, it's especially important to focus on communication style, initiative, and compatibility.

This isn't just about ticking off skills on a resume. A **good interview** helps you understand how someone works, not just what they've done.

Here's a checklist of questions we include in our own process to help assess fit:

- **How do you handle mistakes or feedback?**
  ou're not looking for perfection—you're looking for ownership and resilience.

- **What tools are you most comfortable with?**
  Whether it's Slack, Trello, HubSpot, or Canva, this gives insight into their ramp-up time and familiarity with your tech stack.

- **How do you prioritize when everything feels urgent?**
  This reveals how they organize themselves under pressure.

- **What kind of tasks or clients do you enjoy working with most?**
  You want someone who lights up doing the work you need, not someone who's just tolerating it.

Step 5: Making the hire

You've found someone. Great. But this is where a lot of people think the job's done—when in reality, it's just beginning.



Here's what we recommend doing next to set things in motion:

- → **Confirm a start date** and make sure you've allowed time for proper onboarding.
- → **Document your expectations** including communication norms, working hours, and responsibilities.
- → **Get their tools and access ready** password managers like **LastPass** can speed this up.
- → **Schedule your first 3 check-ins** treat the first month as a guided runway, not autopilot.

At this stage, clarity matters more than perfection. You don't need a **50-page SOP manual.** You just need to create an environment where your VA can show up, feel trusted, and know what success looks like.



What's next?

You've done the hard part; let us take it from here.

By defining the role and getting clear on what you need, you've already set the foundation for a successful VA partnership.

Now it's our turn.

Book your kick-off call with a VA Solutions expert, and we'll match you with the right assistant — one who's skilled, vetted, and ready to help you reclaim your time and scale smarter.

Ready to hire?

Schedule your call here