

# Virtual Assistant Onboarding Checklist



Use this checklist to ensure your onboarding process is thorough and effective.

Before Their First Day:	
<input type="checkbox"/>	Define roles and responsibilities.
<input type="checkbox"/>	Prepare SOPs and internal documents.
<input type="checkbox"/>	Create accounts and provide login credentials.

First Day:	
<input type="checkbox"/>	Introduce the company, team, and culture.
<input type="checkbox"/>	Set up communication tools.
<input type="checkbox"/>	Share training materials and resources.

First Week:	
<input type="checkbox"/>	Schedule regular check-ins.
<input type="checkbox"/>	Define task deadlines and performance goals.
<input type="checkbox"/>	Assign a mentor or point of contact.

First Month:	
<input type="checkbox"/>	Conduct a performance review.
<input type="checkbox"/>	Gather feedback from the VA.
<input type="checkbox"/>	Adjust workflows as needed.

**Reminder:** The first month with your Virtual Assistant is a critical time as you both learn to work together and build a strong foundation. Our Client and Staff Relations (CSRO) team is here to address any concerns or issues you may encounter, ensuring a seamless and productive transition. Don't hesitate to reach out for support!