

Virtual Assistant Checklist

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- ☐ Selecting Virtual Assistant
 - ☐ Try several virtual assistants at the same time.
 - ☐ Come up with a few basic tasks that will give you a good idea of their skill level.
 - ☐ Use tasks that require several skills.
 - ☐ Take the top candidates and give them a second, more difficult, project.
 - ☐ Settle on whomever you prefer to work with.
- ☐ Key Skills of Your Virtual Assistant
 - ☐ Good spoken and written English.
 - ☐ Proactive.
 - ☐ Quick learner.
 - ☐ Well-organized.
- ☐ Training Your Virtual Assistant
 - ☐ Have her/him go through some online video training that fits your project.
 - ☐ Keep your training resources organized.
 - ☐ Keep a document with links to everything you have asked your assistant to read as part of training.
 - ☐ Create a list of how to do tricky things step by step.
 - ☐ Have her/him create documentation of processes and the steps to do various things.
- ☐ Managing Your Virtual Assistant
 - ☐ Set task duration expectations.
 - ☐ Make sure to give enough background information to work effectively.
 - ☐ Make sure you have some type of low priority task to work on if she/he run out of things to do.
 - ☐ Make sure that something isn't taking a lot longer than you expect.
 - ☐ Create a regular timesheet.
 - ☐ Create screen casts.
 - ☐ Set up screen sharing so you can take a peek at what your assistant is working on.