



Client- Virtual Assistant Matching Check-list

Introduction:

At MFAgency, we understand the importance of seamlessly onboarding new clients and matching them with skilled virtual assistants (VAs) to achieve their goals effectively. This checklist serves as an example of our structured approach to client collaboration and project management.

Client Discovery and Expectation Setting:

- Conduct initial consultation with client to understand goals and expectations.
- Document client requirements, preferences, and project specifics.
- Clarify client's preferred communication channels and availability.

Virtual Assistant Selection and Assignment:

- Assess client's needs and match with suitable virtual assistant (VA) based on skills, expertise, and work style.
- Introduce selected VA to client with background information and relevant experience.
- Confirm client's approval and finalize VA assignment.

Onboarding and Introduction:

- Arrange introductory meeting/call between client, assigned VA, and project manager.
- Provide client with VA's contact information and schedule.

Task Planning and Schedule Management:

- Collaborate with client and VA to establish project milestones and deadlines.
- Create task list and schedule based on client's requirements and priorities.
- Assign project manager to oversee task management and ensure schedule **adherence**.

Communication and Support Channels:

- Set up communication tools (e.g., email, chat, video conferencing) between client, VA, and project manager.
- Outline process for ongoing communication and updates.

Managerial Support and Quality Assurance:

- Assign dedicated project manager to address client queries and assist VA with project details.
- Conduct regular check-ins with client and VA to monitor progress and address any issues promptly.
- Ensure quality assurance by reviewing deliverables and gathering client feedback.

Client Satisfaction and Feedback Loop:

- Establish feedback mechanism to gather client input on VA performance and overall satisfaction.
- Implement necessary adjustments based on client feedback to optimize project outcomes.

Continuous Improvement and Relationship Management:

- Foster long-term client relationships through proactive communication and personalized support.
- Encourage client to provide testimonials or referrals based on positive experiences.