

Virtually Debbie

Complete Checklist: Hiring Your First Virtual Assistant

Phase 1: Preparation & Planning

Define Your Needs

- List all tasks you want to delegate (admin, scheduling, email, social media, etc.)
- Identify which tasks are most time-consuming or repetitive
- Determine whether you need specialized skills (bookkeeping, design, technical)
- Estimate hours needed per week (5, 10, 20, 40 hours)
- Set your budget range (hourly rate or monthly retainer)
- Decide on time zone requirements and availability windows
- Choose whether you need a contractor or employee (tax implications vary)

Determine Logistics

- Identify tools and software your VA will need to use
- Ensure you have necessary software licenses or accounts
- Decide on communication channels (Slack, email, Zoom, etc.)
- Plan your onboarding timeline
- Determine how you'll track time and productivity
- Establish your preferred payment method and schedule

Prepare Standard Operating Procedures (SOPs)

- Create SOPs for your top 5-10 most frequent tasks before hiring
- Don't wait for perfection - simple SOPs are better than none
- Use screen recording tools (Loom, Screencastify) to show processes
- Store SOPs in an organized, accessible location (Google Drive folder, Notion)
- Plan to build remaining SOPs collaboratively with your VA during onboarding

Phase 2: Creating SOPs (Standard Operating Procedures)

Why Create SOPs Before Hiring

SOPs save you countless hours of repetitive explanations and ensure consistency. Even basic SOPs are infinitely better than relying on verbal instructions every time.

Priority SOPs to Create First

- **Email management** – How to filter, label, respond to common inquiries, flag urgent items
- **Calendar management** – Scheduling preferences, buffer times, meeting types, how to handle conflicts
- **Social media posting** – Brand voice guidelines, posting schedule, hashtag strategy, approval process
- **Customer service responses** – Templates for common questions, escalation procedures
- **Data entry tasks** – Where information goes, formatting requirements, quality checks
- **Invoicing/billing** – When to send, templates to use, follow-up procedures
- **Meeting preparation** – What materials to prepare, how far in advance, distribution lists
- **File organization** – Naming conventions, folder structure, where things are stored

SOP Format (Keep It Simple)

Each SOP should include:

- **Task name** and when it should be done
- **Goal/outcome** – What success looks like
- **Step-by-step instructions** – Numbered, specific steps
- **Screenshots or video** – Visual aids are incredibly helpful
- **Tools/access needed** – Links and login information location
- **Common mistakes** to avoid
- **Who to ask** if they get stuck
- **Expected time** to complete

Easy Ways to Create SOPs

- Record yourself doing the task with Loom (free screen recording)
- Use Google Docs with screenshots for written SOPs
- Create a simple checklist in Notion or Asana

- Start with bullet points, refine later
- Have your VA help document processes as they learn them

SOP Library Organization

- Create a central "VA Handbook" or "Operations Manual" folder
- Organize by category (Admin, Marketing, Customer Service, etc.)
- Include a master index/table of contents
- Keep a "Process Videos" folder for Loom recordings
- Make everything searchable and easily accessible

Remember: You don't need perfect SOPs before hiring. Create basic versions for your top tasks, then build the library together with your VA. They'll often spot gaps or improvements you missed!

Phase 3: Creating the Job Description

Essential Components to Include

- Write a compelling job title (be specific: "E-commerce Virtual Assistant" vs. "Virtual Assistant")
- Include a brief company overview and mission
- List core responsibilities in order of priority
- Specify required skills and experience level
- Mention preferred qualifications or nice-to-haves
- State working hours and time zone requirements
- Include compensation range (builds trust and saves time)
- Describe your work style and company culture
- List tools and platforms they'll be using
- Explain application instructions clearly

Budget-Friendly Hiring Strategies

If you're working with a tight budget, consider these options:

Pay What You Can Afford:

- Entry-level VAs: \$3-8/hour (often Philippines-based)
- Mid-level VAs: \$8-15/hour
- Experienced/specialized VAs: \$15-30+/hour

- Be transparent about your budget – the right person will appreciate honesty

Alternative Compensation Models:

- **Trade/barter arrangements** – Exchange your services for VA work
- **Testimonial/portfolio building** – Great for new VAs who need experience and reviews
- **Equity or profit-sharing** – Small percentage for the right long-term partner
- **Hybrid model** – Lower hourly rate + performance bonuses
- **Start part-time** – Begin with 5-10 hours/week and increase as revenue grows

Philippines-Based VAs (Popular Budget Option):

- Filipino VAs often have excellent English and strong work ethic
- Cost of living is lower, so \$4-8/hour is competitive there
- Post on OnlineJobs.ph (specifically for Filipino workers)
- Many have experience with US/Western businesses
- Time zone consideration: Philippines is 12-13 hours ahead of US Eastern time
- Be respectful of cultural differences and holidays

Trade/Testimonial Hiring Tips:

- Be upfront in job posting: "Seeking VA for testimonial exchange" or "Trade opportunity"
- Set a specific time period (e.g., "3 months of work in exchange for testimonial + portfolio pieces")
- Provide detailed, thoughtful testimonials and referrals
- Offer to be a reference for future clients
- Create case studies of their work for their portfolio
- Still maintain professionalism – this is a real business relationship
- Best for: New VAs building their business, students, career changers

Making Low-Budget Hiring Work:

- Start with simple, clearly defined tasks (not complex projects)
- Invest extra time in training and clear SOPs
- Be a great client – respect their time, pay on time, communicate clearly
- Offer growth opportunities as your business grows
- Consider hiring someone for a trial project before committing long-term

Red Flags to Avoid in Your Posting

- Avoid vague descriptions like "wear many hats" without specifics
- Don't create an unrealistic laundry list of expert-level skills for entry pay
- Include realistic expectations about response times and availability

Phase 4: Posting & Sourcing Candidates

Choose Your Platforms

- Post on specialized VA platforms (Belay, Time Etc, Fancy Hands)
- Consider general freelance sites (Upwork, Fiverr, Freelancer)
- **OnlineJobs.ph** (best for Philippines-based VAs, one-time fee)
- Post on job boards (Indeed, LinkedIn, Remote.co)
- Check VA-specific Facebook groups or Reddit communities
- Ask for referrals from your business network
- Consider agencies vs. individual contractors (pros/cons of each)
- Post in "Virtual Assistant" or entrepreneur groups looking for trade opportunities

Create Your Screening System

- Design a simple application form or questionnaire
- Include a skills test or sample task relevant to the role
- Ask for portfolio or work samples in the application
- Request references upfront
- Set a clear deadline for applications

Phase 5: Reviewing Applications

Initial Screening Criteria

- Review applications for attention to detail (did they follow instructions?)
- Check for relevant experience in your industry or with similar tasks
- Assess communication quality in their application
- Verify they meet your availability and time zone needs
- Look for professionalism in presentation
- Note any red flags (generic responses, poor grammar for a writing role, etc.)
- Create a shortlist of 5-8 candidates for initial interviews

Portfolio & Work Sample Review

- Evaluate quality and relevance of previous work
- Look for consistency and professionalism
- Check if they have experience with your required tools
- Note any specialized skills that stand out

Phase 6: Conducting Interviews

First Round Interview (15–30 minutes)

- Confirm their availability and time zone compatibility
- Discuss their relevant experience in detail
- Ask about their workspace and internet reliability
- Gauge communication style and professionalism
- Explain your business and what you're looking for
- Discuss compensation expectations
- Narrow down to 2–3 top candidates

Key Interview Questions to Ask

Experience & Skills:

- What types of businesses or clients have you supported as a VA?
- Which tools and software are you most proficient with?
- Describe your most challenging VA project and how you handled it
- What tasks do you enjoy most, and which do you find most challenging?

Work Style & Communication:

- How do you prioritize tasks when you have multiple deadlines?
- What's your preferred communication style and frequency?
- How do you handle a situation where you don't know how to complete a task?
- Tell me about a time you made a mistake. How did you handle it?

Availability & Reliability:

- What is your current workload and availability?
- How do you manage your time across multiple clients?

- What's your backup plan if you're sick or have an emergency?
- How much notice would you need to start?

Problem-Solving & Initiative:

- Give an example of when you identified a problem and solved it proactively
- How do you handle ambiguous instructions?
- What would you do if you noticed an inefficiency in how I run something?

Scenario-Based Questions:

- If I'm unavailable and a client emails with an urgent request, how would you handle it?
- You have three urgent tasks due today. How do you decide what to tackle first?

Second Round Interview (If Needed)

- Conduct a paid trial task (2-4 hours of actual work)
- Observe how they ask questions and clarify requirements
- Evaluate quality, timeliness, and communication during the trial
- Have them demonstrate proficiency with key tools

Phase 7: Reference & Background Checks

Verify Credentials

- Contact at least 2 professional references
- Ask references about reliability, quality of work, and communication
- Verify their claimed experience and skills
- For sensitive roles, consider a background check service
- Review their online presence (LinkedIn, professional website)

Phase 8: Making Your Decision

Compare Final Candidates

- Rate each candidate on key criteria (skills, communication, culture fit)
- Consider trial task performance and quality
- Factor in references and gut feeling
- Review budget fit

- Make your selection

Extend the Offer

- Send a clear offer via email outlining terms
- Include start date, hours, rate, payment schedule
- Specify any trial period (30–90 days common)
- Outline next steps and required paperwork
- **For trade/testimonial arrangements:** Put the agreement in writing (duration, scope of work, what you'll provide in return, exit terms)

Phase 9: Onboarding & Setup

Prepare Before Day One

- Draft a contract or service agreement (consult a lawyer if needed)
- Collect W-9 (US) or equivalent tax forms
- Set up payment method and schedule
- Create email account or grant access to necessary systems
- Prepare login credentials for all tools
- Set up time tracking system
- Create an onboarding document with key information

Week One Onboarding

- Have a kickoff call to review expectations and answer questions
- Provide overview of your business, clients, and processes
- **Share your SOP library** and walk through the most important ones
- Give them a Loom tour of your key systems and tools
- Share brand guidelines, templates, and resources
- Walk through priority tasks and workflows
- Set up regular check-in schedule (daily at first, then weekly)
- Assign initial small tasks to build confidence
- Establish communication norms (response times, preferred channels)
- **Ask them to help document processes** as they learn – they'll catch things you missed

Set Clear Expectations

- Define working hours and core availability times
- Establish how to handle urgent vs. non-urgent matters
- Clarify reporting structure and check-in cadence
- Set performance metrics or KPIs for key tasks
- Discuss confidentiality and data security
- Create a 30-60-90 day plan with goals

Phase 10: First Month Management

Build the Relationship

- Schedule regular check-ins (at least weekly initially)
- Provide constructive feedback early and often
- Recognize good work and progress
- Be patient with the learning curve
- Adjust workload based on their capacity and performance
- **Collaboratively update and improve SOPs** based on their experience
- **Create new SOPs together** for recurring tasks that emerge

Monitor & Adjust

- Track time and productivity
- Assess quality of work regularly
- Identify any skill gaps or training needs
- Refine communication and workflows
- Check in on their experience and satisfaction
- Decide at end of trial period whether to continue

Phase 11: Long-Term Success

Maintain Strong Partnership

- Continue regular check-ins (weekly or biweekly)
- Invest in their growth with training or new opportunities
- Increase responsibilities as they prove themselves
- Pay fairly and consider raises based on performance

- **If you started with trade/testimonial:** Transition to paid work if possible, or provide glowing testimonials and referrals
 - Show appreciation and treat them as part of the team
 - **Keep SOPs updated** as processes evolve
 - Document all processes for consistency and backup coverage
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Bonus: Common Mistakes to Avoid

- **Hiring too quickly** - Take time to find the right fit
- **Unclear expectations** - Be specific about what you need
- **Poor onboarding** - Invest time upfront to save time later
- **No SOPs prepared** - Even basic documentation saves huge amounts of time
- **Micromanaging** - Trust your VA to do their job
- **Under-communicating** - Especially in the beginning, communicate frequently
- **Not documenting processes** - Create SOPs for recurring tasks
- **Expecting perfection immediately** - Allow time for learning
- **Forgetting to give feedback** - Both positive and constructive
- **Undervaluing budget hires** - Treat all VAs with respect regardless of rate
- **Not formalizing trade arrangements** - Always put agreements in writing

Tools to Consider for VA Management

- **Communication:** Slack, Microsoft Teams, Zoom
- **Project Management:** Asana, Trello, ClickUp, Monday.com
- **Time Tracking:** Toggl, Time Doctor, Clockify
- **File Sharing:** Google Drive, Dropbox
- **Password Management:** 1Password, LastPass
- **Documentation:** Notion, Google Docs, Confluence