

Client Onboarding Form

Welcome to Systemera

Virtual Assistant Intake Form

I'm excited to start working together!

This form helps me understand your business, preferences, and goals —
so we can kick off strong and make the most of our collaboration.

Please complete this form before our kickoff call.

BUSINESS INFORMATION

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Let's start with the basics. Tell me a bit about your business below

What's the name of your business?

Website or main social media link

What industry or niche are you in?

Best contact email address

SCOPE OF WORK

TASKS

Support Needed

Email Management

☐

Calendar Management

☐

Social Media Support

☐

Administrative Tasks

☐

Customer Service

☐

Other

☐

Are there any key dates, deadlines, or priorities we should be aware of?

TOOLS & ACCESS

Please indicate which areas require tool access or login credentials.

- ☐ Email Management
- ☐ Calendar Management
- ☐ Social Media Support
- ☐ Administrative Tasks
- ☐ Customer Service
- ☐ Other

OTHER

Which tools or platforms will you be providing access to?

(e.g. Gmail, Asana, Canva, Flodesk...)

Is there an IT or tech contact we can reach out to if needed? (Optional)

COMMUNICATION PREFERENCES

Let us know how you prefer to communicate and how often you'd like to receive updates.

COMMUNICATION CHANNELS

☐ Email

☐ Slack

☐ Whatsapp

☐ Trello

☐ Other

UPDATE FREQUENCY

☐ Daily

☐ Twice a week

☐ Weekly

☐ As needed

FINAL NOTES

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Is there anything else I should know to support you best?

What does success look like in our collaboration?

Are there any concerns or questions you'd like to share?

Thank you for sharing your insights — I'm excited to work together!