

VA Starter Kit

DIGITAL BUNDLE

TOOLS & TEMPLATES TO START WORKING
WITH CLIENTS PROFESSIONALLY

Table of Contents

VA Starter Kit

Title	Page
1. Client Onboarding Form A structured intake form including 6 pages: Welcome, Business Info, Scope of Work, Tools & Access, Communication Preferences, and Final Notes.	3-8
2. Weekly Task Planner Organize your weekly client tasks with clear priorities and space for reflection.	9-10
3. Thank You Page A warm conclusion to leave a professional final impression.	11

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

BUSINESS INFORMATION

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

Virtual Assistant Intake Form

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

What does success look like in our collaboration?

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

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

WEEKLY OVERVIEW

for Virtual Assistants

Use this space to map your week at a glance.

Monday	Tuesday	Wednesday	Thursday	Friday
Priority	Priority	Priority	Priority	Priority
Task	Task	Task	Task	Task
Meetings	Meetings	Meetings	Meetings	Meetings
Notes	Notes	Notes	Notes	Notes

General Notes

CLIENT TRACKER & REFLECTION

Client	Task	Status	Notes
Client A		<input type="checkbox"/>	
Client B		<input type="checkbox"/>	
Client C		<input type="checkbox"/>	
Client D		<input type="checkbox"/>	
Client E		<input type="checkbox"/>	
Client F		<input type="checkbox"/>	

What worked well this week?

What could be improved?

Focus for next week

VA STARTER KIT

Thank you

Thanks for investing in your VA journey.
You're ready to work professionally with
confidence.

Thank you for using this tool — Systemera