

STEP-BY-STEP GUIDE TO LAUNCHING A VIRTUAL ASSISTANT BUSINESS



**A Practical Guide to Landing Your First
Client and Start Earning Income.**

By Terri McWatters



A personal message from me

Welcome!

I'm beyond excited you're here and ready to start your virtual assistant journey!

This guide was created from my love of helping people build something meaningful while creating freedom and flexibility on their terms.

With years of experience as a Certified Executive Assistant, I've had the privilege of working alongside agencies, entrepreneurs, and creatives, bringing order to the chaos and helping big visions come to life.

This industry holds a special place in my heart because it's allowed me to do what I love while working from home, and for many years, with a little one by my side.

So, if you're ready to create a life that truly works for you, then you're in the right place. I can't wait to cheer you on every step of the way!

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1

Identify and develop your skills

Start by making a list of your skills, your interests, and your strengths. If you struggle with this, you can start by writing down all of the things that you do in a day, whether it is in professionally in your work, your family, or your own day-to-day tasks. If you are still struggling, message a friend or family member and ask what they think your core strengths are. From this list, start to pull the things that you are confident in and, most importantly, enjoy doing.

From that list, think about how your skills can translate into services for clients.

Here are some examples:

- **Inbox management & communication flow** - If you're good at keeping your email organized or even handling things like contacting customer support for orders or tracking, etc., you can manage a client's inbox, sort messages, flag priorities, draft replies, and handle support tickets.
- **Client onboarding** - Ever helped a friend get set up with an account, sent welcome notes, or made sure all the right documents were in place? That's the same skill you'll use to welcome and organize new clients for a business or onboarding tasks.
- **Project coordination** - If you're the one keeping family schedules on track, planning events, or managing school projects, you already know how to track timelines, update people, and make sure things get done on time.
- **Research & resource gathering** - Do you Google the best deals, compare products, or find new tools for your own life? Those skills translate directly into researching vendors, gathering data, or scouting software for a client.
- **Community engagement** - If you enjoy posting in Facebook groups, moderating conversations, or jumping into discussions online, you can offer services like group management, replying to comments, and creating engagement for clients.
- **Content repurposing** - Do you take something you've learned (like a podcast, video, or article) and share it with friends in a shorter, simpler way? That's content repurposing, turning a podcast episode into social posts, or a blog into an email.
- **Tech & tools setup** - If you are a bit more tech-savvy or if you have ever set up a Zoom call, created a graphic or invitation in Canva, made a Pinterest board, or organized a digital checklist, those same skills can help clients get their tools running smoothly.

Focus on the services you can confidently deliver from day one. You don't need to do everything; choose a few things comfortable with and that you'd be excited to offer.

Next, you will want to enhance your skills by taking online courses, attending workshops, or simply using YouTube or other video tutorials so that you can start to offer these as a professional service.

Most programs offer free training or a step-by-step walk-through on how to navigate and build within the platforms, often free when you sign up. This is incredibly useful when starting, and when you don't yet have a client to use their accounts.



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Define your rates

When I was first starting out, I was told to go with a number that would keep the lights on and adjust from there. That's still one of the best places to begin. Your rates should reflect your skills, experience, and the value you bring to your clients, but most importantly, they have to be rates you can actually live on.

It's also important to consider the area you live in and where your ideal clients are based, since expectations and rates can vary. While I can't give a specific number, here are some tips for helping choose a rate.

Before you look outward, look inward.

Add up your monthly expenses: rent/mortgage, utilities, groceries, childcare, etc., and divide that number by how many hours you realistically want/can work. For example, if you need \$2,000/month and can work 20 hours/week (80 hours/month), your minimum rate should be \$25/hour just to keep the lights on. This gives you a baseline rate that feels realistic and sustainable.

Research the Market.

Look at what other virtual assistants are charging, especially those with similar skills and experience. Here are some ways to do this:

- Browse freelance websites like Upwork or Fiverr to see job posts and the listed rates. Be sure to filter these platforms for your home country, as they are used globally, so the rates will vary.
- Search Facebook groups. You can join groups for business owners to search recent job posts, or join groups aimed at directly supporting other Virtual Assistants, and ask others in your area with similar skills what they are charging.
- Search online, and again, be specific to your area and list your skill set. You can typically get a good starting range directly from sites like Google. In addition, you will most likely get links to agencies that will give price points for what business owners can expect to pay.

Decide on a Pricing Model.

Once you have chosen the rates that work best for you, here are some options to think about for invoicing:

- hourly rates: This is the most common, and makes tracking easier, especially when you are first starting.
- Packages: For example, 10 hours of VA support for \$300. Clients love knowing what they'll pay, and it helps with a consistent budget each month.
- Project-based: Flat fee for a specific task, for example \$250 for setting up a client's project management platform.

Once you have decided on your rates and your pricing model, it's always best to revisit them often as your skills grow and as you work with more clients and gain more experience.



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Create your home office space

Your home office isn't about having the "perfect" setup; it's about creating a space that helps you show up confidently for your clients and stay focused while working from home.

Working from home can be incredibly freeing, but it can also be challenging when it comes to distractions. That's why having a dedicated "work space" (even if it's just a corner of a room) is so important. Your home office doesn't need to be fancy, but it should set you up for focus, professionalism, and long-term health.

Here is why a Dedicated Workspace Matters:

- **Professionalism:** A clean, neutral background, like positioning yourself with a wall behind you, helps you look polished and confident in virtual meetings.
- **Focus:** When you sit in your "work spot," your brain associates it with productivity, making it easier to get into work mode.
- **Health:** A proper chair and desk setup protects your posture, avoiding back, neck, and wrist pain down the road.
- **Boundaries:** Having a defined space signals to others (and yourself) that you're "at work," even when you're at home.

Office Must-haves and tips to keep focused

Remember: Start with what you have, then upgrade as you go. Even small improvements can make a big difference in your focus and professionalism.

Noise Solutions

- If you can't close a door, use a good noise-canceling headset. Bluetooth is great, but you can forget to charge it or have issues disconnecting, so a simple pair that plugs in is great to have on hand.
- If you have noise in the background, try playing classical, lo-fi, or study music to help you focus and block distractions. Choose music without lyrics as it's easier to concentrate when the words don't compete with your thoughts.

Tech Tips

- Make sure you have a reliable laptop or desktop that can handle video calls, multitasking, and the tools you'll use daily.
- A stable internet connection is essential as clients expect you to be dependable online. (Tip: if your Wi-Fi is spotty, plug in directly with an Ethernet cable.)
- An external microphone and stand are a great upgrade when you're ready; they instantly boost sound quality on calls.
- An external webcam positioned at eye level for a more professional look.

Create your home office space cont'

Desk & Chair Setup

- Avoid working from bed or the couch; it can cause posture problems over time.
- Use a desk or table at a comfortable height and a supportive chair to protect your back and shoulders.
If you don't have an office chair, an ergonomic pad for your chair helps give some support.

Additional tips:

- Lighting matters: Sit facing a window or add a ring light so your face is clear on video calls.
- Declutter: Keep your workspace simple and organized; less clutter = less stress.
- Personalize: Add one or two items that motivate you (a plant, a motivational quote, your favorite photo, etc.).



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Create a marketing strategy

Marketing doesn't have to be complicated or overwhelming. When you're just starting, it's less about boxing yourself into a niche and more about having clarity.

Think of it this way, your first clients care less about whether you've nailed down a niche and more about whether you can communicate how you can make their life easier. That's why your focus should be on defining your services, telling your story, and getting visible in ways that feel authentic.

Here are a few practical steps to help you do that:

Define What You Offer

- Start with the list of services that you feel confident in and keep it simple. Pick 3–5 services you'd be excited to deliver today.
- Next, create a simple statement that you can use on a website, portfolio, or social profile. Example: "I help busy entrepreneurs save hours each week by managing their inbox, scheduling content, and keeping client communication running smoothly." This statement not only tells them what you do, but why it's important.

Tip: You can use ChatGPT to polish your service descriptions into short, clear statements that sound professional and client-focused.

Identify Your Ideal Client (for now)

- Start with who you'd enjoy working with (creative businesses, coaches, agencies, etc.).
- Find out what problems they struggle with by checking job posts, browsing entrepreneur groups, or simply asking business owners what tasks they wish they could hand off.
- Use any experience you may already have (for example, if you've worked in real estate, you can position yourself as a VA for agents, as you already know the ins and outs).

Just remember, until you gain more experience, your "ideal client" may evolve.

Craft Your Story & Pitch

Clients connect with people, not just services. Your story sets you apart.

- Share why you chose to become a VA.
- Highlight the skills or experiences you bring to the table.
- Remember to keep it clear, short, and professional, something you can use in an email, social post, or introduction at a networking event.

Create a marketing strategy cont'

Build Your First Portfolio

Even if you don't have clients yet to show examples, here are some things to start with:

- Create a simple website; you can use a drag-and-drop builder like Squarespace or a more customizable one on WordPress. Both have full step-by-step tutorials on YouTube or online.
- Design a portfolio in Canva showing mock examples of the work you can do.
- Treat yourself as your "first client" by setting up your own systems, social accounts, or blog to showcase your skills.

Market Like Your Clients Do

The goal isn't to spend your days on social media chasing hundreds of clients; it's to make real connections so the right clients find you. The way you promote yourself teaches you how to support future clients, by starting with:

- SEO (Search Engine Optimization) Basics: Use keywords like "Virtual Assistant for online coaches" or "Inbox Management VA" on your website, LinkedIn, or even Instagram bio so clients searching for support can actually find you.
- Social Proof: Share tips, quick wins, or behind-the-scenes of your work on LinkedIn, Instagram, or Facebook.
- Networking: Join local or online business groups. Attend virtual events or coworking sessions where entrepreneurs hang out.

Make Genuine Connections Over Cold Pitching

Instead of throwing yourself into the "sea of VAs" competing on price:

- Build relationships with people who could refer you.
- Offer value by sharing resources or answering questions in groups.



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Payments and invoicing

One of the most important parts of running your business is making it easy for clients to pay you. Even if you're just starting, sending a clean, professional invoice sets the tone that you're running a real business, not just doing "side tasks."

Here are some things to think about when setting up for payments:

Currency & Location

- Decide what currency you'll charge in (USD, CAD, AUD, GBP, EUR, etc.). This will depend on where you and your clients are located.
- Be aware of conversion rates and any fees if you work with international clients.
- Pick a primary currency for your pricing to keep things consistent and simplify invoicing and bookkeeping. Most payment platforms allow you to receive multiple currencies, but having one main currency avoids confusion.

Payment Platforms

- **Stripe:** Accepts credit/debit payments and integrates with invoices.
- **Wise (formerly TransferWise):** This is ideal for international clients, with low conversion fees.
- **PayPal:** Widely used, though fees can be higher.
- **Direct Bank Transfer:** Best option if a client is local to you.

Note: If you start on freelance platforms like Upwork or Fiverr, they handle invoicing and payment collection; you just need to connect your bank account to receive the funds.

Invoicing Tools

- Most payment platforms like Stripe, PayPal, and Wise let you send invoices directly. You would just need to set up your bank account so that payments go directly to you.
- You can also use platforms like Wave, FreshBooks, QuickBooks, etc. to create professionally branded invoices, and the same like the payment processors, just connect your bank account for the payments.

Professional Touch

- Customize your invoices with your name, logo, or business name.
- Include details such as: A breakdown of the services provided, the hours worked if hourly, or the flat rate/package name.
- Add a short note in the memo section like: "Thank you for your business. Payment due within 7 days."



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Networking and building relationships

Working from home can feel isolating at times. It is important to build connections not only for support but also for troubleshooting, referrals, and collaboration, which makes your business more sustainable.

Having other VAs and service providers in your network makes a huge difference. This isn't necessarily about socializing but about creating a circle of people you can learn from, share insights with, and rely on when you need help.

Here are some things to think about when building relationships:

Finding Your Community

- Join online spaces not just for VAs, but for other online service providers and entrepreneurs in communities like Facebook or LinkedIn.
- Look for communities that align with you. Some are more casual, others are more business-focused, and some are more specific to moms. Whatever feels more authentic to you is where you should spend your time connecting.
- If you can, join a local co-working space or virtual meetups, being able to actually chat in person or virtually with cameras on can recharge your energy.

Support & Collaboration

- Use your network for troubleshooting. Sometimes another VA has already solved the problem you're facing, and it's good to be able to get guidance so you can handle issues faster for your clients.
- Finding an accountability partner can help you stick to your goals, especially when building your business. Even casual "working together" time can make solo workdays more enjoyable.
- Outsource services when it makes sense, for example, a VA who's great with graphics might need someone strong in tech, or may have some tasks that they need help with, like a large data entry project.

Professional Touch

- Building trust with peers means you'll naturally be thought of when opportunities come up. Don't see other VAs as "competition." There are more clients than you think, and collaboration often leads to more work.
- Treat your peer relationships like professional connections. It's important to be mindful of their time and boundaries.
- Be generous with sharing insights, templates, or tools, as you'll often receive the same in return.
- Always follow through on collaborations; this builds trust and strengthens your reputation



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Getting your first client

Landing your first client is exciting, but it is essential to know that your goal isn't to convince someone to hire you at all costs. It's about finding clients who align with how you work and who value the services you provide. This is a partnership, not an employer-employee relationship. You're running a business, and that means you get to choose the clients who are the right fit for you just as much as they're choosing you.

Start by Sharing What You Do

- Let former employers or colleagues know you're now offering Virtual assistant services. They already understand your skills and professionalism, which makes them more likely to hire you or refer you.
- Share a simple post on LinkedIn or other social platforms. This isn't about expecting friends or family to become clients, but about making it easy for people to connect you with someone who needs your help.
- Keep it simple: "I'm offering [service]. If you or someone in your network needs support, I'd love to connect."

Freelance Platforms & networking your services

- Platforms like Upwork, Fiverr, and LinkedIn can help you search or filter for clients who are looking for your services.
- Search in Facebook groups and online communities where business owners are actively looking for support.
- Create a professional LinkedIn profile or a simple Facebook business page where potential clients can quickly see what you do. Share quick tips, showcase your skills, or simply have a place where clients can check out your expertise before working with you. Always include a clear call to action, for example: Reach out if you'd like to learn more about my services.

Discovery Calls are not interviews

- When you meet with a potential client, think of it more like a coffee chat. The goal is to see if you're a good fit to work together. You're not applying for a job, you're exploring a partnership.
- The focus should be: "How can I bring value to their business?" not "Do I have every skill they're asking for?"
- If a tool comes up that you haven't used, be honest. Say: "I haven't used that specific one, but I've used similar tools or I am open to learning." Most clients care more about problem-solving and being a quick learner than the actual tool.

Getting your first client cont'

Setting boundaries

- It's important not to offer free trials or to work for free to "prove yourself." Even when you're excited about an opportunity, or if a client suggests it, remember that your time and skills are valuable from the start.
- It's okay to say "no" to tasks outside your comfort zone or things you don't want to do long-term. Many clients don't realize that the work they're asking for may actually require multiple roles, so setting clear boundaries protects you from burnout.
- Most importantly, a client is not your boss. They are hiring your business for a professional service, and you set the terms of what you provide.

Proposals & Rates

- Negotiation is normal, but don't let clients dictate your worth. They can share their budget, but you decide your pricing.
- Send a simple proposal outlining the services you'll provide, your rate, and the scope. You can find templates on Canva or create a simple document to send to a client.
- Position yourself as the professional. Simply put, your services solve problems, and your rates reflect your expertise and your time.

Building Momentum

- Once you land your first client, focus on providing excellent service.
- Great communication, reliability, and results will lead to referrals.
- Word of mouth is one of the strongest ways to grow, and it starts with how you show up for your clients.

Skills Audit

Interests



Strengths



Skills Audit

Virtual Assistant business quick start checklist

Business foundation

Identify your skills and who you would want to support.

Create a professional email address (example: yourname@gmail.com).

Set up basic file organization on Google Drive or Dropbox.

Write down 3–5 skills you already have that could support clients.

Services

Choose your starting services (example: admin support, email management, scheduling, social media).

Decide if you want to charge hourly, by package, or by project.

Draft your service list (keep it simple, just 1–2 starter offers are fine).

Payments

Decide on your main currency.

Set up a payment platform (PayPal, Stripe, or Wise).

Create a simple invoice template (include your name, services, and due date).

Visibility

Polish your LinkedIn profile or a simple Facebook business page.

Write a short bio/description of what you do.

Create a short introduction to post or share your services and offers.

Networking

Join 1–2 VA or entrepreneur groups on Facebook.

Post quick tips or answer questions in a group, LinkedIn, or a forum where your ideal clients hang out.

Engage with other service providers, leave supportive comments, and start genuine conversations.

First Client

Reach out to former colleagues or employers to let them know you're available for VA services.

Respond to at least 1 job post or opportunity.

Prepare a simple proposal template.

Practice your discovery call

General task checklist

Done

To Do

Client Discovery Call Prep Sheet

Potential client’s business name & industry

Challenges their business is having

Questions to ask

Notes

Reflections and notes

Free Tools to Get Started as a Virtual Assistant

Research & Troubleshooting

TinEye (Reverse Image Search): tineye.com – Check where an image came from or if it's being used elsewhere.

ChatGPT: chat.openai.com – Ask questions, brainstorm, draft copy, or troubleshoot tech.

File & Document Management

iLovePDF: ilovepdf.com – Convert, merge, or split PDFs.

Sejda PDF Editor: sejda.com/pdf-editor – Edit PDFs (free up to 3 tasks/hour).

Google Workspace (Docs, Sheets, Drive): workspace.google.com – Free storage and online office tools.

Project & Task Management

ClickUp: clickup.com – Organize projects and tasks.

Asana: asana.com – Task and project management with team collaboration features.

Clockify: clockify.me – Free time tracking for hourly work or productivity tracking.

Design & Media

Canva: canva.com – Create graphics, presentations, and social media content.

Remove.bg: remove.bg – Instantly remove image backgrounds.

Audacity: audacityteam.org – Free audio editing software (great for podcasts or cleanups).

Loom: loom.com – Record quick screen-share videos for clients.

Learning & Professional Development

PMI Free Trainings: pmi.org – Learn about project management basics.

HubSpot Academy: academy.hubspot.com – Free training in marketing, sales, and client communication.

Google Skillshop: skillshop.exceedlms.com – Free certifications on Google tools (Ads, Analytics, Workspace).

Thank you for allowing me to be a part of your journey!

With this workbook, you now have the foundations to confidently start and grow your Virtual Assistant business.

Remember, you don't need to know every tool or have everything figured out before you begin. What matters most is your willingness to learn, set clear boundaries, and treat your services as a professional business.

Start simple, stay consistent, and build step by step. Your first client is just the beginning, and each experience will help you grow stronger, smarter, and more confident as a Virtual Assistant!



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