



Virtual Assistant Checklist Quick Reference Guide

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The Ultimate VA Hiring Checklist Delegate Smarter. Grow Faster.

This checklist is your guide to confidently hiring a virtual assistant who will help scale your business without breaking the bank.

Why You Need a Virtual Assistant

Hiring a Virtual Assistant (VA) allows you to focus on high-impact tasks by offloading admin work, marketing, and routine operations. Whether you're a real estate professional or small business owner, this guide will help you take the first steps toward smart delegation. By the end, you'll know how to confidently find, hire, and onboard your first (or next) VA.

Step 1: Get Clarity on What to Delegate

Sort your workload into categories, like the ones below:

- Admin – Email, calendar, data entry
- Marketing – Social media, content creation
- Operations – Lead tracking, CRM updates

Step 2: Define the Role

- Turn your task list into a clear job post:
- Title and hours needed
- List of daily/weekly responsibilities
- Required tools and platforms
- Desired experience and pay range

Step 3: Where to Find a VA

Top platforms and what they offer:

- OnlineJobs.ph – Long-term, affordable help
- Upwork – On-demand freelancers
- Fiverr – Task-based gigs
- Agencies – Fully managed support

Step 4: Screen and Interview

Ask the right questions and give a small paid test task:

- What are your backup plans for power or internet outages?
- Describe a time you solved a problem without supervision.
- Test task: Sample lead entry or appointment setting

Step 5: Onboard Smoothly

First impressions matter. Set them up for success:

- Email account, password manager (e.g. LastPass)
- Access to project tools (Asana, Google Drive)
- Kickoff call and SOP walkthrough

Step 6: Set Expectations & Track Progress

Define success with simple metrics and rhythms:

- Daily check-ins during week 1
- Weekly goals and KPI tracking
- Use tools like ClickUp, Slack, Clockify or Trello

Sample Templates

Use these quick-start templates to get going fast:

- Job Post Description Template – Includes tasks, skills, pay

- Weekly Tracker – Simple table with deadlines
- SOP Outline – Step-by-step task instructions
- Interview Questions – Basic interview questions

1. Creating the Right Job Description

A well-crafted job description is the foundation for attracting the right virtual assistant. In this section, you'll focus on clearly outlining the role's responsibilities, required skills, expected outcomes, and tools they'll use. The description should reflect the specific needs of your business and set clear expectations from day one. A strong job description not only helps you find qualified candidates but also ensures they understand their role and how they'll contribute to your business success.

Sample Job Description: Virtual Administrative Assistant

Position: **Virtual Administrative Assistant**

Type: Part-Time / Full-Time (Specify)

Reports to: Business Owner / Operations Manager

Overview:

We are looking for a reliable and highly organized Virtual Administrative Assistant to provide remote support in managing day-to-day operations. This role requires excellent communication skills, attention to detail, and the ability to multitask in a fast-paced environment.

Key Responsibilities:

Manage calendars and schedule appointments

Respond to emails and handle routine correspondence

Organize digital files and maintain cloud-based document storage

Assist with data entry, reporting, and basic bookkeeping

Coordinate meetings and prepare agendas or notes

Create and update spreadsheets, forms, and templates

Conduct internet research and compile findings

Support project management efforts as needed

Handle basic customer service tasks such as follow-up calls or emails

Qualifications:

Proven experience in an administrative or virtual assistant role

Strong written and verbal communication skills

Proficiency in Microsoft Office and/or Google Workspace

Ability to manage time effectively and meet deadlines

High level of discretion and professionalism

Familiarity with tools like Slack, Trello, or Zoom

Preferred Skills:

Experience with CRM platforms (e.g., HubSpot, Zoho)

Basic knowledge of bookkeeping software (e.g., QuickBooks)

Social media scheduling or light content creation is a plus

Tools You May Use:

Google Workspace / Microsoft 365

Trello / Asana

Slack

Zoom / Google Meet

Calendly

Dropbox / Google Drive

2. Weekly Tracker

Task	Deadline (Day/Time)	Completed (Y/N)	Notes / Follow-Up Needed
1. Return missed calls & voicemails	Daily by 4:00 PM		
2. Respond to emails & inbox clean-up	Daily by 3:00 PM		
3. Schedule appointments & confirm daily calendar	Daily by 10:00 AM		
4. Update CRM with new leads & client activity	Mon/Wed/Fri by 5:00 PM		
5. Prepare weekly report of tasks completed	Friday by 3:00 PM		
6. Manage social media posts (schedule or draft)	Tuesday by 4:00 PM		
7. Update website listings or property pages	Thursday by 4:00 PM		
8. Enter receipts/expenses into bookkeeping system	Friday by 1:00 PM		
9. Follow up with vendors/contractors for open tasks	Wednesday by 12:00 PM		

10. File & organize digital documents (Drive/Dropbox)	Friday by 2:00 PM		
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3. SOP Template

STANDARD OPERATING PROCEDURE (SOP) TEMPLATE

1. SOP TITLE

Write a clear, simple title that describes the task (e.g., “Client Onboarding – New Buyer Intake”).

2. SOP NUMBER (Optional)

If you use numbering, add it here (e.g., SOP-ADM-001).

3. DEPARTMENT / ROLE

List the department and/or role responsible for this SOP (e.g., “Administration – Virtual Assistant”).

4. EFFECTIVE DATE / LAST UPDATED

Enter the date this SOP goes into effect and the last time it was updated.

5. PURPOSE / OVERVIEW

In 2–4 sentences, explain why this SOP exists and what it covers.

Example: “This SOP explains how to process new rental applications so all applicants are handled consistently and in compliance with company standards.”

6. SCOPE

Explain who this SOP applies to and when it should be used.

Example: “This SOP applies to all admin VAs when a new inquiry is received from the website or rental listing.”

7. RESPONSIBILITIES

List the roles involved and what each one is responsible for in this process.

Example: “Admin VA – collects documents and updates tracking sheet. Business Owner – gives final approval.”

8. REQUIRED TOOLS & ACCESS

List the systems, logins, or tools needed to complete this SOP.

Example: Email, CRM, Google Drive, Phone system, Property management software, etc.

9. DEFINITIONS (Optional)

Define any terms, abbreviations, or labels used in this SOP that might be unclear.

Example: “CRM = Customer Relationship Management system (Podio).”

10. STEP-BY-STEP PROCEDURE

Use numbered steps. Each step should be clear and action-based.

If needed, break steps into sub-steps (10.1, 10.2, etc.).

10.1 Trigger / When to Start

Describe what event starts this process.

Example: “Begin this SOP when a new inquiry comes in from the website contact form.”

10.2 Main Steps

Write each step in order. Example format:

1. Action Step #1 – What to do first.
2. Action Step #2 – What to do next.
3. Action Step #3 – Include where to click, what to say, or what to select.
4. Continue until the task is fully complete.

10.3 Completion / When You're Done

Describe what “done” looks like for this task.

Example: “This process is complete when the client file is created in Google Drive, the CRM is updated, and the owner has been notified via Slack.”

4. Sample interview questions:

Virtual Admin Interview Questions: Phone screening questions are highlighted below

1. Tell me a little about yourself?
2. Do you have any admin experience?
3. Do you understand the job description for which you applied?
4. Why do you think you would be a good fit for this position

5. This is a part-time position, 15 hrs a week does that work for you?
6. What hours are you available to work? Preferable work schedule is 10-3 MW F
7. Can you make calls to the US?
8. Can you text to the US
9. Do you know anything about social media marketing? Can you do social media postings?
10. Do you have any real estate experience?
11. Do you have any follow up or lead generation experience?
12. How long have you worked as a virtual assistant? Do you currently have other clients/Jobs
13. All jobs have challenges. What past tasks or jobs were challenging or frustrating for you?
14. Do you prefer a set routine everyday or do you like to structure your own day?
15. Based on the job description, how would you prioritize your day?
16. Based on what we have discussed today, what intrigues you about this position?
17. Is this a position you think could work for you?
18. Do you have any questions for me?

Final Thoughts

Start small. Pick 2–3 recurring tasks and delegate them. Let your VA grow with you. Ready to go deeper? Check out my book, **Leveraging Virtual Assistants for Cost-Effective Growth**, or book a strategy call at www.tancymason.com/book