

Preparing to hire a virtual assistant.

In today's fast-paced business landscape, the demand for virtual assistants is on the rise — and a good one helps you regain precious time to focus on the work that actually moves things forward. But the key to a successful partnership begins with careful preparation. Here are the steps I walk every client through before we begin.

BEFORE YOU HIRE

01

Define your processes

The first step in preparing for a virtual assistant is to define your processes. Take a closer look at how you manage your daily tasks and responsibilities. What are the recurring and routine tasks that take up a significant portion of your time? Create a comprehensive list of these tasks to give your virtual assistant a clear understanding of your day-to-day operations.

02

Create a list for special projects

While routine tasks are important, don't forget to consider one-time projects or special activities you'd like to delegate — event planning, research projects, or content creation. Listing these separately helps you communicate your short-term and long-term needs effectively.

03

Calculate the time needed

Once your tasks are clearly defined, calculate the time required to perform each one. Understanding the time investment for each assignment lets you determine how many hours you'll need from a virtual assistant. This not only helps you assess their workload, it ensures you're making the most of the collaboration — optimizing productivity and freeing up your own time to focus on what matters most.

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04 Write the job description

A clear job description helps you attract the right person. It outlines the tasks, expectations, and skills required for the role so candidates understand exactly what they're signing up for.

05 Create an onboarding list

To ensure a smooth transition, create an onboarding list of the tools and resources your VA will need access to. Be clear about which software, accounts, and data they'll require, and consider a secure password sharing service such as [1Password](#) or [Bitwarden](#). Setting your VA up properly from the start saves you both time and frustration.

06 Set aside time for onboarding

Before your VA begins, allocate time for onboarding. This is the moment to assign tasks (and decide how you'll assign them), set communication expectations (email, Teams, Slack, text), answer questions, and coach them on your working style. I recommend using [Zoom](#) to host a few sessions — you can show how something is done and record it so they can refer back later instead of having to ask you again.

Keeping a *virtual assistant*.

Alright — now that you've hired your perfect-for-you virtual assistant, how do you keep them? Two habits make the biggest difference.



Frequent check-ins

Small issues are much easier to address early than after they've become habits.

Frequent check-ins create space for questions, feedback, and course corrections before frustration builds.



Workload management

It's vital to manage your VA's workload effectively. Overloading them leads to burnout and reduced efficiency, so monitor their capacity and distribute tasks within their scope. A successful partnership is a collaborative effort, and a manageable workload is crucial.

A great VA relationship isn't about handing off random tasks. It's about creating systems that free up your time, reduce mental load, and keep things moving without everything depending on you. Start with clear expectations, solid onboarding, and open communication, and you'll set both of you up for success.

ready when you are —
Let's make your week feel lighter.

If you're ready to experience the benefits of having a virtual assistant in your corner, I'd be thrilled to be that person for you. Let's have a conversation about how I can tailor my services to your unique needs and goals.

BOOK A DISCOVERY CALL →

I can't wait to chat and discover how I can make your life easier — and your business more successful.