

Virtual Assistant Onboarding Checklist

1. Pre-Onboarding

- ☐ Sign contract agreement
- ☐ Provide personal documentation
- ☐ Receive client introduction/welcome email

2. Access & Tools Setup

- ☐ Create company email account
- ☐ Grant access to project management tools
- ☐ Grant access to shared cloud drives
- ☐ Set up communication tools (chat/video)
- ☐ Add to calendar scheduling system

3. Training & Guidelines

- ☐ Review company policies and procedures
- ☐ Provide training materials and resources
- ☐ Introduce main contacts and teams

4. Tasks & Responsibilities

- ☐ Clarify daily and weekly tasks
- ☐ Assign first set of activities/projects
- ☐ Set clear communication expectations
- ☐ Outline reporting structure

5. Feedback & Check-in

- ☐ Schedule initial check-in meeting
- ☐ Provide support/resources contacts
- ☐ Gather questions or concerns

Notes