

What to Have in Place Before Hiring a Virtual Assistant

When hiring your virtual assistant, ensure your firm has the following information before making your final decision.

Create Your Plan

- Make a list of to-dos for your company and categorize each task into four lists:
 - Only things you can do.
 - Tasks that need completion but not necessarily by you.
 - Tasks that take too much time away from your core projects.
 - A task that you have no interest in doing yourself or can delegate to someone else.
- Decide which tasks are the highest priority for your company.
 - Decide if you are looking for someone for ongoing work or a one-time project.
 - **Longer-term period**—have a list of tasks ready.
 - **Single project**—decide which of your priorities are most important.
- Decide how quickly you need each task done.

Internal Questions for the Company

To help narrow down the kind of virtual assistant your firm needs, ask yourself questions and write down your answers.

- Which general administrative skills does the VA need to have?
- Are you looking for someone who can multitask while managing challenges well?
- Are you looking for someone who can speak multiple languages?
- Do you need someone with knowledge of your industry?
- Do you prefer someone who aligns with your ethics (or point of view)?
- Do you want someone who will ask questions and supply innovative ideas?
- How likely are others in your company willing to accept a virtual assistant?
- How many hours per week (or month) do you need the virtual assistant?
- How quickly do you need to hire your virtual assistant?
- What is your budget, and do you have room to expand the budget if necessary?

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Business Processes to Have in Place

Companies should have the following information for any virtual assistant they hire.

Onboarding Process.

- Use the company onboarding process so virtual assistants understand your company from the ground up.

Documentation.

- Employee handbooks and manuals.
- Performance expectations.
- Policies & Procedures for Remote Individuals.
- Standard Operating Procedures for business processes (if available).
- Contractor monitoring system.

Context and Guidance.

- Desired outcome.
- Details about the work.
- Priority, goals, and expectations.
- Realistic due date.
- Any related work for reference.

Technology.

- Communication methods.
- File sharing preferences.
- Other pertinent technology.
- Project management preferences.
- Proprietary software training.
- Website information.
- Be open to other types.