
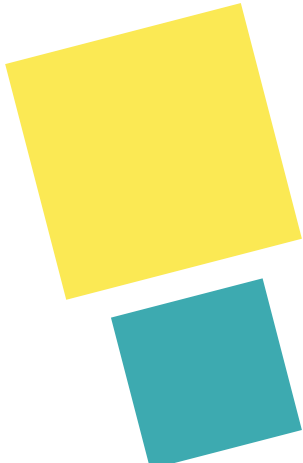



General VA Onboarding Checklist



WILDFIRE
- CONCEPTS -

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- Give them access to their new email address.
 - Send them an invite to the time tracking software you're using.
 - Invite them to use the project management software you like.
 - Get them to sign up for any team communication platform you're using.
 - Send them an email with a list of who's who in your company and how to contact their team members.
 - Check that they correctly installed the time tracking software.
 - Send out an email to your entire team welcoming your new staff member.
 - Send them an onboarding checklist so they could also check if everything is covered.
 - Discuss your expectations for the role and theirs for the job.
 - Tell them about your business objectives and where they fit in.
 - Email them links to any useful documents they should check out before getting to work.
 - Instruct them what to do when they have a question and how to ask for help.
 - Talk to them about your company's values and how to treat other on-site or virtual staff members.
 - Discuss what to do when their internet is down and can't work.
 - Tell them about any remote work perks you're offering.
 - Send them a list of login credentials that would include your 'office' or 'info' email address, any online chat software, or social media accounts.
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- Instruct them on how to answer enquiries from potential leads.
 - Make sure they have access to info about your services and products.
 - Instruct them how to proceed when they need help handling a prospect or a negative comment.
 - Instruct them how to interact and work with the rest of the team.
 - Tell them what is your preferred language for the emails they'll send or the social media answers they'll post in your company's name.
 - Share with them your calendar and make sure they're allowed to add and edit entries.
 - Walk them through your business strategy and daily schedule.
 - Instruct them how to answer phone calls in the name of your company.
 - Get them CC-ed in your emails regarding payroll and accounting.
 - Discuss how you want them to sort incoming emails and if you also want them to check your company/personal email.
 - Instruct them on how to present any research you ask for and how to pitch you their ideas.
 - Create a WordPress account for them so they could approve/delete comments to your blog posts.
 - Instruct them how to maintain your contact list.
 - Discuss what they should expect next: tasks and objectives for the next week and the next month.
 - Send them an initial to-do list and get them to reach out to you when they finished their first task.
 - Review their work and provide feedback.
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