

## Virtual Assistant Onboarding

# Kickstart Call

*File > Make a Copy*

| Name | Date |
|------|------|
|------|------|

### Relationship

1. Excited about? *(here you want to note 3 reasons why you are excited about the relationship and then list 3 reasons why the VA is excited about the relationship)*

2. 4 interesting things? *(here you can list 4 interesting things about you and you can ask for 4 interesting things about your VA, this could be about career, family life, hobbies, likes/dislikes etc)*

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## Project

3. Our business *(the goal here to explain who you are, what you do, who you help and how you help them, don't go into a tonne of detail, keep it simple and easy to understand)*

4. I need you... *(here you need to list and go through why you need them within your business, why are they pivotal to the success of the business)*

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## Progress

5. Tools I use... *(here you can list the tools you use as a business, this can include CRMs, social platforms, lead software or anything they need to know about and get familiar with).*

6. Set up tools *(at this stage you want to get them set up with the tools they need access to, to be successful at the job you have given them. You can use [LastPass](#) to give them access to tools without giving them passwords)*

