

VA ONBOARDINGTM
IN 6 WEEKS

Elite Agency Success System | Scale | VA Onboarding



JESS DENSLEY
REAL ESTATE COACH

Virtual Assistant Onboarding™

Title

Connection

Ritual

Campaign

Outcome

GETTING TO KNOW
EACH OTHER:
YOUR BUSINESS AND
GOALS

ESTABLISH INNER
COMMUNICATION
RHYTHM

ROLL OUT FIRST
PROJECT

You

PREP FOR MEETING:
1. GOALS
2. BACKGROUND
3. QUESTION VA

SET-UP A DIARY
DAILY CHECK-IN
WEEKLY TRACKER
MONTHLY STRATEGIC
CALL PLAN

DECIDE ON FIRST
PROJECT:
PREPARE FOR
BRIEFING

VA

SET TOOLS:
1. VOXER 2. SLACK
3. EMAIL 4. LAST PASS
5. CRM 6. DROPBOX

* MARKETING * CLIENTS
* ADMIN * REPORTS
* PERSONAL * TEAM

SET-UP PROJECT
SYSTEMS +
FOLLOW UP

Virtual Assistant Onboarding - Week # 1 The Kickoff Call

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">RELATIONSHIP</p>	<p>I'M EXCITED ABOUT...</p> <ul style="list-style-type: none"> * * * * 	<p>MEET YOU</p> <ul style="list-style-type: none"> * BACKGROUND * FAMILY * PASSION * FAVOURITE FOOD 	<p>MEET THE VA</p> <ul style="list-style-type: none"> * BACKGROUND * FAMILY * PASSION * FAVOURITE FOOD 								
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">ASSIGNMENT</p>	<p>OUR BUSINESS</p> <ul style="list-style-type: none"> * WHO WE SERVE * PROBLEMS WE SLOVE * OUR PRODUCTS OR SERVICES 	<p>I NEED HELP WITH</p> <ul style="list-style-type: none"> * * * 	<p>3 THINGS I NEED FROM YOU</p> <table border="0"> <thead> <tr> <th>YOU</th> <th>VA</th> </tr> </thead> <tbody> <tr> <td>* </td> <td>* </td> </tr> <tr> <td>* </td> <td>* </td> </tr> <tr> <td>* </td> <td>* </td> </tr> </tbody> </table>	YOU	VA	*	*	*	*	*	*
YOU	VA										
*	*										
*	*										
*	*										
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">MOMENTUM</p>	<p>TOOL WE USE:</p> <ul style="list-style-type: none"> * PHONE NUMBER * SLACK * CRM * VOXER * SKYPE * EMAIL * CALENDAR * PROJECT MANAGEMENT * LASTPASS 	<p>FIRST STEP, SET UP ALL TOOLS:</p> <ul style="list-style-type: none"> * * * * 	<p>NEXT SESSION</p> <p>DATE</p> <p>TIME</p> <p>AGENDA:</p> <ul style="list-style-type: none"> * PROJECT * TOOLS * TIMING 								

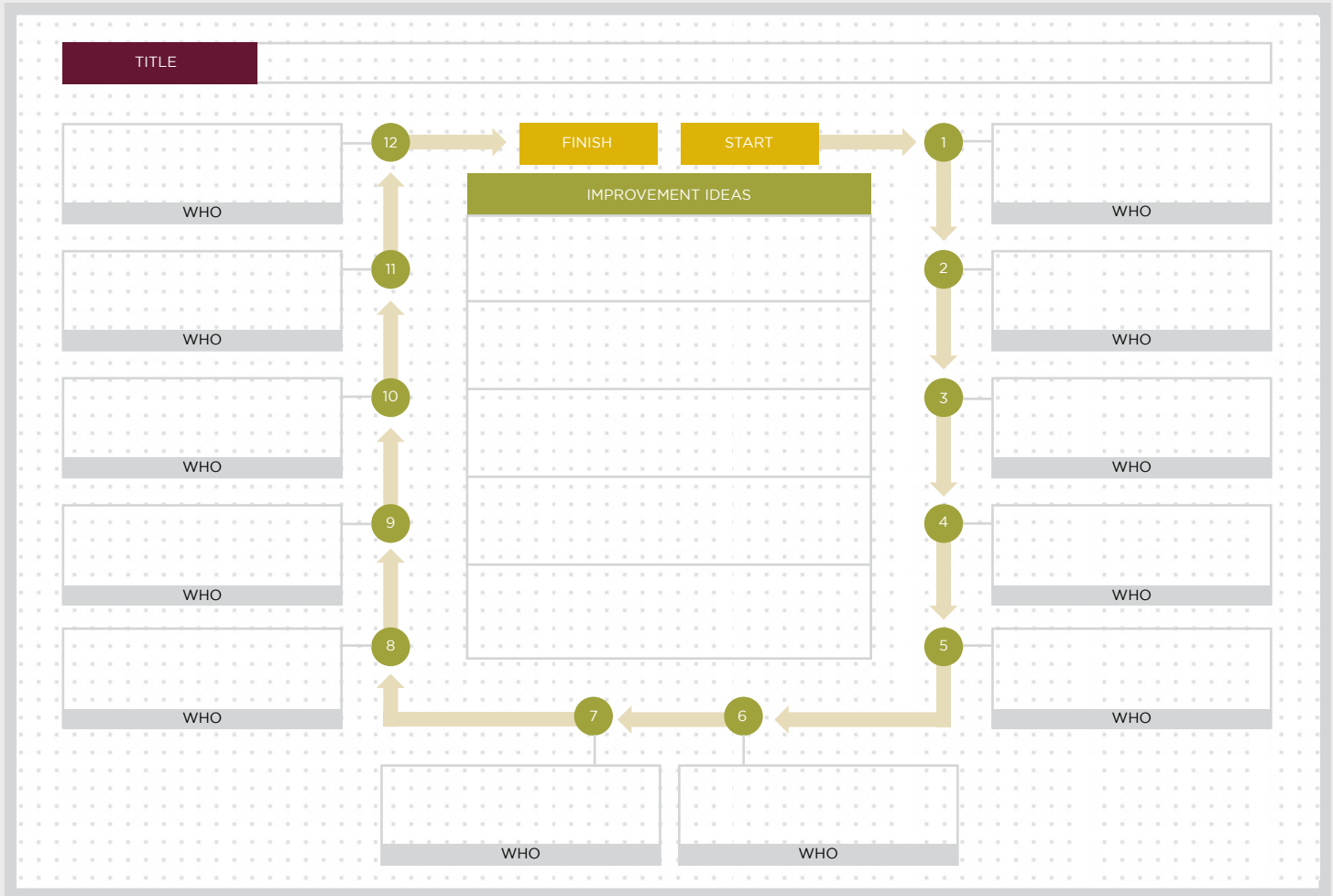
Virtual Assistant Onboarding - The Communication Builder

RECEIVING INFORMATION	<ul style="list-style-type: none">* PHONE* SKYPE* TEXT* VOXER	WHAT IS THE MOST EFFECTIVE WAY?	WHAT IS THE LEAST EFFECTIVE WAY?
GIVING INFORMATION	<ul style="list-style-type: none">* EMAIL* LISTS* DIAGRAMS* DETAILS	WHAT IS THE FAVOURITE WAY?	WHAT IS YOUR LEAST FAVOURITE WAY?
TIMING	<ul style="list-style-type: none">* CERTAIN TIME OF DAY* LAST MINUTE/IN ADVANCE* SCHEDULED MEETINGS/ ON THE FLY	WHAT IS THE BEST TIME TO COMMUNICATE WITH YOU?	WHAT IS THE WORST TIME TO COMMUNICATE WITH YOU?
INSIGHTS			
BIGGEST INSIGHT:		WHAT ACTION CAN YOU TAKE TO IMPROVE YOUR COMMUNICATION?	

Virtual Assistant Onboarding - Week #2: Rhythm

FIRST 5 SYSTEMS TO DELEGATE	ACTION:	DATE:
1		
2		
3		
4		
5		

The Unique Task Method



Virtual Assistant Onboarding - Week #3: The Personal Task Manager

	SAT	SUN	MON	TUE	WED	THURS	FRI
FIRST UP							
MID-MORNING							
LUNCH							
AFTERNOON							
PLAN NEXT DAY							

Virtual Assistant Onboarding - Week #4: The Personal Message Matrix

ME	TEAM	CLIENT	SYSTEM

Virtual Assistant Onboarding - Week #4: The Email Builder

TOPIC	SUBJECT:
1. CREATE NEXT 5 TEMPLATES	INTRODUCTION:
2. ESTABLISH INITIAL RESPONSE	BODY:
3. TIME TO SEND	CLOSE:

Virtual Assistant Onboarding - Week #5: The Broadcast Builder

Topic:

TASK	WHO	WHEN	✓
DECIDE THEME OF BOARDCAST	YOU		
VOICE RECORD	YOU		
TRANSCRIBE VOICE RECORDING	VIRTUAL ASSISTANT		
EDIT & PREPARE MESSAGE	VIRTUAL ASSISTANT		
REVIEW & APPROVE	YOU		
SCHEDULE & SEND	VIRTUAL ASSISTANT		

CREATE NEXT 3

TOPIC 1

TOPIC 2

TOPIC 3

Notes

A large grid of dotted lines for taking notes, consisting of 10 columns and approximately 40 rows.

Virtual Assistant Onboarding - Week #6: Campaign Planner

PROBLEM	CAMPAIGN
OUTCOME	

Virtual Assistant Onboarding - Week #6: Campaign Planner

SKETCH YOUR CAMPAIGN FLOWCHART HERE:

Virtual Assistant Onboarding - Week #6: Campaign Planner

TASK	WHO	WHEN	✓

Virtual Assistant Onboarding - Week #6: Onboarding Review

WINS	IMPORTANCE	FURTHER PROCESS	NEXT ACTION

Notes



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