LATAM VA ONBOARDING CHECKLIST

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30-Day Checklist

Week Before Start Date

☐ Verify VA has necessary equipment (laptop, internet, backup power)

☐ Create email account and send welcome email

☐ Provision access to all systems (Slack, PM tools, Google Workspace, CRM)

☐ Send login credentials via secure method (password manager)

☐ Share company handbook, brand guidelines, security training

☐ Compile relevant SOPs in onboarding folder

☐ Record Loom videos for complex workflows

☐ Draft Week 1 task list (simple, confidence-building tasks)

☐ Notify team of VA's start date and role

☐ Schedule intro meetings with key team members

☐ Assign onboarding buddy if possible

Check Week 1: Welcome & Orientation

Day 1

☐ Welcome call completed (60-90 minutes)

☐ Role clarity discussed (responsibilities, success metrics, growth)

☐ Communication expectations documented

☐ Team structure explained

☐ Tools setup session (screen-share)

☐ Password manager and 2FA enabled

☐ First small task assigned

Days 2-7

☐ Daily check-ins established (morning + EOD)

☐ At least 3 SOPs reviewed

☐ Administrative tasks assigned (organize folders, update CRM)

☐ First real deliverable assigned

☐ Shadowing opportunity provided

☐ Team introductions completed

☐ Week 1 feedback session completed

☐ Week 2 goals and tasks outlined

Week 2-3: Integration Phase

☐ All recurring tasks assigned and documented

☐ First project-based deliverable assigned

☐ Async communication protocols documented

☐ Decision-making authority clarified

☐ Performance metrics tracking initiated

☐ At least 2 instances of constructive feedback provided

☐ Weekly check-in cadence established (30-60 min video call)

☐ Cross-training on secondary tasks initiated

☐ VA demonstrates understanding of escalation criteria

☐ At least 1 process documented by VA

☐ Team integration observed (Slack engagement, meetings)

☐ Week 4 performance review scheduled

Week 4: 30-Day Assessment

☐ 30-day performance review completed (60-90 minutes)

☐ Specific accomplishments documented and celebrated

☐ Constructive feedback provided (situation-behavior-impact)

☐ VA self-assessment conducted

☐ Performance metrics reviewed (quality, speed, communication)

☐ Goals for Months 2-3 established

☐ Task assignments adjusted based on performance

☐ Training plan created if needed

☐ Decision made: continue or adjust approach

☐ 60-day check-in scheduled

Key Performance Metrics to Track

Quality Metrics:

• Error rate (tasks requiring revisions)

• Adherence to instructions

• Attention to detail

Speed Metrics:

• Task completion time

• Response time during working hours

Communication Metrics:

• Proactive updates

• Question quality and clarity

• Problem-solving initiative

Cultural Integration:

• Team rapport

• Adaptability to feedback

• Cultural and values alignment

QUALITY   SPEED   COMMUNICATION   CULTURE

Download the full onboarding playbook and templates at:

www.sharkhelpers.com/onboarding-resources

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