

GETTING READY - VA NEW STARTER CHECKLIST

Emails and calendar invites:

- Email set up – Google apps
- Signature set up in emails - marketing to create animated signature
- Add to team catch ups in the calendar
- Book 1:1's for first 2 weeks, daily
- Book 1:1's once a week for 1st month
- Schedule in training session as per schedule with team members
- Email 1st day objectives ready for the first morning
- Give calendar access to my calendar
- Provide calendly link for me

Google Drive:

- Share folders
- Share training documents and videos - ASAP so can watch beforehand

Toggl:

- Send link and get VA to set up free account
- Ask them to diarise every second
- Monday to send PDF report
- Ask them to diarise every month end to send PDF report for the month
- Ask them to watch the Toggl training video to make sure to allocate time spent on different activities

Payment method:

- Confirm if preference is Upwork, Revolut, PayPal or Transferwise
- Ask for details to be sent with first timesheet

Whatsapp:

- Add to team Whatsapp group
- Ask team to individually message on first day to welcome them

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Scoop Page:

- Ask marketing VA to create a new Scoop Page for them

LinkedIn:

- Create profile wording - title, summary and experience
- Ask marketing to send banner image
- Announce on LinkedIn they are joining the team – first day

Technology access:

- Create LOXO account
- Add to sales navigator team
- Send SalesQL instructions re. data lookups
- VPN - surf shark
- Last pass - passwords and logins