

Your Guide To A Successful Onboarding With Your Assistant!



Don't worry - we'll take care of the heavy lifting. We just wanted to give you a few pointers so that we're all prepared and set up for success.

Our Process



PRE-ONBOARDING

We're working on a **30-60-90** day plan based on your unique needs.

Your assistant is familiarizing themselves with your company, requested tasks, and software.

You should review page 3 to prep for onboarding!



ONBOARDING

Our operations manager will facilitate your onboarding call between you and your assistant.

Plan to review priorities and first tasks, processes, and system logins.



SUCCESS JOURNEY

We'll be continuously supporting your assistant behind-the-scenes (so it's really like you're getting the support of a network of assistants)!

Additionally, we'll be checking-in with you periodically to ensure we're meeting your expectations.

Review page 4 & 5 for how to best work with your assistant and what to expect from us for quality check-ins.

Before Our Call

You've just taken a huge step forward by adding a secret weapon to your team, your new assistant. Your VA will be your partner that removes blocks, defends precious time, and helps you turn your business strategy into an implemented success story.

The first step toward success here is your onboarding call so we want to pass along 3 keys to making your onboarding process successful!

1 BE CLEAR ON THE TASKS YOU ARE DELEGATING TO YOUR ASSISTANT

From our previous conversations, we have a good idea of what you need your VA to do. Though, during your call, we're going to ask **which tasks you want your VA to start handling immediately**. This is an important question to make sure none of your retainer hours are wasted! We can get clear about this during the call but, it's helpful if you start thinking about it beforehand.

You can edit the list of tasks you want to review by visiting your 30-60-90 board at auxosvs.monday.com. This is our task and project management system.

2 BE READY TO PROVIDE ACCESS.

Often, your VA will need password access to CRMs, email inboxes, or other platforms. Come to the meeting prepared with this info so we can make sure your VA can login securely and has access to the programs they need to get started on day one. If you have some process documentation in place, this would be helpful information to share at the meeting as well.

If you aren't comfortable sharing the specifics for login credentials, consider a tool like Lastpass to securely share information.

If your VA will need a separate login, then we recommend an easily transferable set up such as "admin@yourdomain.com"

Working With Your Assistant

We promise to always work to provide you with high quality support. Though, there's only so much we can do behind the scenes. A lot of the success will come from how you and your assistant interact. Here's a few tips on delegating and managing your assistant:

PRIORITIZE CHECK-INS



Consistent communication is essential in having a successful support relationship. During your onboarding call, we will confirm what day and time you and your assistant will have a regular check-in. We emphasize phone or video call communication when possible, especially in the first few weeks, because it helps to build trust, clarifies misunderstandings, and helps your assistant more fully understand you and your business. These check-ins are essential to building and maintaining a consistent working relationship and ensuring the two of you are on the same page moving forward.

We share some tips on how to effectively run these meetings in a way that benefits both you and your VA in this [article](#).

SET CLEAR EXPECTATIONS, BOUNDARIES, DEADLINES, ETC.



An element of strong communication is clarity. You want to be clear in your expectations for quality of work, due dates, etc. For more ways to navigate this and effectively delegate, read our blog, [Strategies for High Performing Managers: Setting Effective Expectations](#)

EXPECT TO PROVIDE TRAINING



Our VAs will come to you with a champion mentality and an experienced administrative skill set. We have a figure-it-out and get-it-done mindset but, we can't read minds. Be prepared to review any specialized programs or systems you use, share any already documented processes, and clarify any unique preferences you may have.

ADDITIONAL RESOURCES

Hopefully these tips help to optimize your working relationship with your virtual assistant. We have a few other resources you can check out:

- [Building Trust With a Virtual Assistant](#)
- [Effectively Tracking Your VA's Tasks Without Micromanaging](#)
- [5 Processes To Solidify With Your Team Now](#)

Lean On Us

Beyond your assistant's regular check-ins, you'll also hear from our operations team to make sure everything is going smoothly! Communication might seem a bit heavy when we first start working together but it will settle and lighten as time goes on.

Here's what to expect:

- We'll be a part of your **onboarding call** to foster introductions and ensure everyone has a strong start.
- We'll join your **second check-in call** with you and your assistant to keep tabs on their progress.
- We'll send you a survey at the **45-day** mark to get your feedback on their performance and schedule a one-on-one call with you.

If at ANY TIME you need extra assistance, have a concern, or simply have a question, do not hesitate to reach out to our Operations Manager, Sandra White: sandra.white@auxosvs.com

FAQ

WILL THE ONBOARDING CALL COUNT AGAINST MY RETAINER?

No. We charge a separate onboarding fee so that your call can take as much time as we need. This time does not go against your retainer time. Plan for 60-90 minutes for your call.

I DON'T WANT TO EMAIL MY QUESTIONS. HOW CAN I REACH YOU?

You can schedule time with Sandra White anytime with this [scheduling link](#).

I NEED MORE TIME THAN WHAT MY RETAIENR ALLOWS. WHAT DO I DO?

Your assistant will notify you when they are reaching your retainer limit and ask if you'd like them to prioritize specific tasks until the end of the month or if you'd like to approve additional hours. If you approve additional hours, you will be invoiced the following month for any additional time worked. If you consistently need more hours, we will recommend upgrading your retainer.

IT'S A SLOW MONTH AND I DIDN'T USE ALL MY HOURS. DO I GET A REFUND?

We don't refund for retainers but we do provide rollover hours. Rollover hours must be used in the immediately following month. If you are consistently not providing enough work for your assistant to fulfill your retainer hours, we can downgrade your retainer. You must provide a 30-day notice to downgrade. See your contract for more details!

**If you have a custom retainer and your level is not listed in this graph, please reach out to us for clarity on your rollover hour limit.*

Retainer Level*	Rollover Hour Limit
10	0
20	2
40	5
60	10
80	12