



VIRTUAL ASSISTANT

FREELANCER

CHECKLIST

Decide on Your Virtual Services & Niche

- [Is a career as a virtual assistant right for you?](#)
- List your skills and responsibilities
- Note the ones you enjoy and those you don't
- Focus on the skills and responsibilities you love doing
- Expand your list to accommodate skills you'd like to learn about
- Decide on the virtual services you'll offer your clients

Examples of Niche and Specific Skills You May Offer

- Calendar management
- Email management
- Graphic designing: for websites, social media, ads, etc.
- Editing images, audio and videos
- Writing: website content, eCommerce copywriting, ebook ghostwriting, etc.
- Social media management
- Bookkeeping
- Transcribing audio and video content
- Marketing and Promotion
- Data entry
- Tutoring

LEARN HOW TO BECOME A VA

Create a Statement That Clearly Says What You Do

For example: My name is _____ I assist _____ with _____ so they can _____.

Set Up Your Office

- Create a dedicated workspace
- Get the necessary furniture
- Get a computer, internet connection, hardware, software
- Set up your filing options: offline filing cabinets, online cloud-based filing
- [Learn how to deal with distractions in your home office](#)

Decide on Your Target Market

Find your [ideal client](#) in the following online places:

- Your website
- Blog & share it
- Social media channels
- Online groups and forums
- Set up [Google Alerts](#)
- Create an email list and offer a freebie
- [Online Marketplaces](#)

GET READY TO CREATE A SUCCESSFUL CAREER AS A VIRTUAL ASSISTANT

Create Your Website

- Decide on a domain name for your website
- Confirm that your domain name isn't already trademarked.
- Register your business name with your local government or state
- Purchase the domain name for your website and pay for website hosting
- Discover your own unique brand personality
- Choose the branding colours and links you will use for your website

Set up Your Social Media Channels

- Claim your social media/links
- Fill out your social media profiles accordingly
- Get rid of "digital dirt" on you (if any)
- Add your social media buttons to your website

Work Out Your Rates

- Work out the hourly rate you'll charge for your services
- Create packages to sell your services as a bundle
- Decide on the amount of time you'll be available to work per week
- Create a pricing sheet for your services

Get Your Processes Organized

- Select a tool you'll use to track your time
- Choose an invoicing / accounting software tool you will use
- [Create a contract you'll use between you and the client](#)
- Pick the project management tools you'll use between you and the client
- Create an intake questionnaire for your clients
- Create a portfolio of your previous work
- Create a welcoming package for new clients outlining your processes
- Open a separate business bank account for your VA earnings
- Develop a weekly plan for keeping track of your money flow (cash vs expenses)

Take Care of the Legalities

- Apply for EIN number
- Set reminders on your calendar for paying taxes
- Choose whether you will operate as a sole proprietor or LLC and register as such

Decide on How You Will Keep Track of Your Taxes

- Keep your VA expenses separate from personal expenses
- Keep all your receipts in the same place
- Use apps such as [FreshBooks](#), [Evernote](#), [Quicken](#), etc.
- Sort your freelance receipts in categories: contract, labour, office supplies, advertising, etc.

Connect with Community

- Facebook groups
- Virtual assistant forums
- Virtual assistant resource websites

Freelance Business Name:

Website:

Hourly Rate: \$

How Many Hours Per Week I Devote to Working:

Preferred Working Time Zone:

Top 5 Virtual Assistant Services I'll Offer:

- 1)
- 2)
- 3)
- 4)
- 5)

Virtual Assistant Skills I Want to Learn:

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Will I Operate as an LLC or a Sole Proprietor:

My Target Market / Ideal Client:

My Dream for Working from Home:

Best Tools for Your Virtual Office Arsenal



Project Management App - [Basecamp](#)

Using Basecamp increases accountability: you can assign a task to someone, get notified about your new tasks, and view your tasks from all projects in one screen.

You can communicate efficiently on Basecamp: communications are organised within each project. And you get all your notifications in one place. And everyone stays in the loop.



Password Security App - [Dashlane](#)

You don't have to remember all your passwords. Dashlane will remember them for you. Your data and financial information are way too valuable for you to be limited to a few variations of your password. Get Dashlane and sync it across all your devices.



Spelling and Grammar Check App - [Grammarly](#)

Do you really want to hand in a sloppy document to your employer? Sometimes, our eyes miss seeing grammatical errors and punctuation issues in the documents we prepare. Use Grammarly to check one more time before submitting your work.



Time Management App - [Rescue Time](#)

This is the tool to help you find your work-life balance. Rescue time runs securely on the background of your computer or mobile device. It will track the time you spend on each application and every website you visit.

Rescue time will then send you an elaborate report on how you spend your day. That's the data you need to refocus and be more productive as a freelancer.



Accounting and Financial Management App - [FreshBooks](#)

FreshBooks is a one stop shop for all your accounting and invoicing needs. With FreshBooks, you can do easy invoicing, effortless expenses tracking, project collaboration, easy to understand reports, among others.