

FREE BEGINNER RESOURCE

Beginner VA Quick-Start Checklist

A calm, practical roadmap for aspiring Filipino virtual assistants who want to stop overthinking and start building.

Use this checklist your way

Print it, type notes beside it, or complete one small section each day. Progress matters more than perfection.

WHAT YOU WILL COVER

01	Your VA foundation	Services, setup, and professional habits
02	Client readiness	Communication, discovery, scope, and onboarding
03	A seven-day action plan	Small, focused steps that build momentum

You do not need to feel fully ready. You only need a clear next step.

Build your VA foundation

Start with a simple offer and a dependable way of working. You can refine both as you learn.

Choose your starting service

- ☐ List three tasks you already know how to do well.
- ☐ Choose one to three services you can deliver reliably.
- ☐ Write one sentence describing who you help and how.
- ☐ Choose one honest practice project to demonstrate your skill.

Create your professional setup

- ☐ Use a professional email address and clear email signature.
- ☐ Create organized folders for leads, clients, templates, and finances.
- ☐ Turn on two-factor authentication for important accounts.
- ☐ Use a password manager and never reuse client passwords.
- ☐ Set your working hours, response time, and preferred communication channel.

Prepare your basic business materials

- ☐ Write a short professional introduction.
- ☐ Draft a one-page resume focused on relevant skills and results.
- ☐ Prepare two or three portfolio samples, clearly labeled as practice work when applicable.
- ☐ Create a simple service list with what is included and excluded.
- ☐ Decide how you will track inquiries, applications, and follow-ups.

Quick reflection

What is the one service you feel most confident offering first?
Write it here: _____

Get client-ready

Professionalism is not about sounding corporate. It is about being clear, dependable, respectful, and prepared.

Before a discovery call

- [] Review the lead's business and the support they requested.
- [] Prepare questions about goals, tasks, deadlines, tools, budget, and communication.
- [] Know your availability and your non-negotiable boundaries.
- [] Prepare a quiet call space and test your audio and internet.

Before saying yes

- [] Confirm the exact scope, deliverables, timeline, and decision-maker.
- [] Clarify price, payment schedule, revision limits, and extra-work process.
- [] Watch for unclear expectations, pressure, disrespect, or requests for unpaid work.
- [] Put the final agreement in writing and seek qualified advice when needed.

For a smooth onboarding

- [] Send a warm welcome message with clear next steps.
- [] Collect only the information and access needed for the work.
- [] Confirm communication channels, reporting rhythm, and response expectations.
- [] Create the client folder, task board, and first-week priorities.
- [] Schedule a first-week check-in and document decisions.

Keep it honest

Never invent client work, testimonials, experience, or results. Practice projects and transferable skills are valuable when labeled clearly.

PART 3

Your seven-day momentum plan

Give yourself 30 to 60 focused minutes per day. Keep the scope small enough to finish.

DAY 1

Choose your offer

[] Select one service, one target client type, and one clear outcome.

DAY 2

Polish your introduction

[] Write a short introduction for your resume, portfolio, and applications.

DAY 3

Create one sample

[] Build one honest practice project that shows your process and attention to detail.

DAY 4

Prepare your messages

[] Draft an inquiry reply, follow-up, meeting confirmation, and boundary message.

DAY 5

Set up your tracker

[] Track opportunities, contact dates, status, follow-up date, and notes.

DAY 6

Practice a discovery call

[] Say your questions aloud and practice explaining your service and next steps.

DAY 7

Take one brave action

[] Apply to a suitable opportunity, contact a warm lead, or share your offer.

Your next step

The action I will complete today:

Cheering you on,

Faith

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