



VIRTUAL ASSISTANT SETUP GUIDE

Free Up 10-15 Hours Per Week Without Hiring Locally

A step-by-step guide to finding, hiring, training, and managing a Virtual Assistant - even if you have never delegated before.

A good VA costs \$5-10 AUD/hour and can handle email, calls, scheduling, CRM updates, and lead qualification - freeing you to focus on sales and strategy.

Why You Need a VA

Most business owners are drowning in tasks that do not require their expertise. You are answering emails, updating spreadsheets, chasing invoices, and qualifying leads - all while the high-value work (sales, strategy, client delivery) gets squeezed into whatever time is left.

A Virtual Assistant is not a luxury. It is the fastest, cheapest way to buy back your time. For \$200-400 per week, you can reclaim 10-15 hours to work ON your business instead of IN it.

This guide walks you through exactly how to find, hire, train, and manage a VA - even if you have never delegated before.

Step 1: Define What to Delegate

The Golden Rule: Start narrow. Give your VA ONE core responsibility. Expand only after they have mastered it. VAs who juggle 10 different tasks will fail at all of them.

Best First Tasks for a VA:

- **Gatekeeper / Lead Qualifier:** Answer enquiries via phone and email, qualify leads using your criteria, and book appointments directly into your calendar. This alone can free up 10+ hours per week.
- **Email Management:** Sort your inbox, draft replies for your approval, flag urgent items, and archive completed threads. You review and approve; they do the heavy lifting.
- **CRM Updates:** Log all customer interactions, update contact records, move leads through your pipeline stages, and maintain data hygiene.
- **Social Media Enquiries:** Respond to DMs and comments with templated replies, escalate complex questions, and ensure no enquiry falls through the cracks.
- **Admin Tasks:** Data entry, invoice chasing, appointment scheduling, document formatting, and research tasks.

⚠ COMMON MISTAKE: Do NOT try to make your VA do everything from day one. Pick ONE area, systematise it with clear processes, then expand their responsibilities gradually over 2-3 months.

Questions to Ask Yourself:

- What tasks do I do repeatedly that do not require my specific expertise?
- What tasks do I avoid or procrastinate because I find them tedious?
- What would have the biggest impact on my time if someone else handled it?

Step 2: Find Your VA

Where you hire matters. Different platforms attract different skill levels and price points. Here is a comparison to help you choose:

Platform	Best For	Typical Cost
OnlineJobs.ph	Filipino VAs - excellent English, strong work ethic	\$5-10 AUD/hr
Upwork	Skilled specialists, global talent pool	\$10-30 AUD/hr
Fiverr	One-off projects, quick turnaround	Project-based
VA Agency	Hands-off management, pre-vetted candidates	\$15-25 AUD/hr

✓ **RECOMMENDATION:** Start with OnlineJobs.ph. Filipino VAs have excellent English, strong work ethic, and cultural alignment with Australian businesses. The platform charges a one-time fee (not ongoing commissions), making it cost-effective for long-term hires.

What to Include in Your Job Post:

- Clear description of the role and responsibilities
- Required skills and experience
- Working hours (specify Australian timezone requirements)
- Pay rate range
- How to apply (ask a specific question to filter serious candidates)

Step 3: Interview and Select

The interview reveals more than any resume. Use these questions to find someone reliable, proactive, and honest about their capabilities.

Interview Questions That Reveal the Truth:

- *"Tell me about a time you made a mistake at work. What happened and what did you do?"* - Tests honesty and accountability.
- *"If you did not understand an instruction, what would you do?"* - Tests communication and initiative.
- *"Describe your home office setup and internet connection."* - Tests reliability and professionalism.
- *"What hours are you available to work in Australian time?"* - Tests flexibility and commitment.
- *"Give me an example of when you took initiative without being asked."* - Tests proactiveness.

Red Flags to Watch For:

- Vague answers or difficulty providing specific examples
- Poor audio/video quality during interview (indicates ongoing tech issues)
- Cannot explain gaps in employment history
- Unwilling to do a paid trial task
- Overpromising or claiming expertise in everything

ALWAYS DO A PAID TRIAL: Give your top 2-3 candidates a small paid task (2-4 hours of work). This reveals more than any interview - you will see their actual work quality, communication style, and reliability.

Step 4: Set Up Your Systems

Before your VA starts, have these tools ready. Proper systems make training easier and ensure smooth daily operations.

Purpose	Recommended Tools
Communication	Slack or Microsoft Teams for daily check-ins and quick questions
Task Management	Trello, Asana, or ClickUp to assign, track, and prioritise tasks
Time Tracking	Time Doctor, Hubstaff, or Toggl to monitor hours worked
Phone System	OpenPhone, Aircall, or local VOIP with an Australian number
Video Training	Loom to record screen tutorials they can rewatch anytime
Payments	Wise (formerly TransferWise) for low-fee international transfers
Password Sharing	LastPass or 1Password to share logins securely

Security Best Practices:

- Use a password manager - never share passwords via email or chat
- Create separate accounts with limited permissions where possible
- Enable two-factor authentication on all critical accounts
- Revoke access immediately if the relationship ends

Step 5: Train and Onboard

The training investment pays off 100x. Spend 2-3 hours in week one creating clear documentation. Your VA will use it forever - and so will any future VA you hire.

Training Checklist:

1. **Record Loom videos** of yourself doing each task. Narrate what you are doing and why. These become permanent training resources.
2. **Create written SOPs** (Standard Operating Procedures) with step-by-step instructions. Use screenshots and numbered steps.
3. **Provide scripts and templates** for common scenarios - enquiry responses, lead qualification questions, email templates.
4. **Define escalation rules:** When should they handle it themselves? When should they pass it to you? Be specific.
5. **Schedule daily check-ins** for the first two weeks (15 minutes via Slack or Zoom). This catches issues early.

Step 6: Manage for Success

Weekly Management Rhythm:

- **Daily:** Quick Slack check-in (5 mins) - any blockers? Any questions?
- **Weekly:** 15-30 minute video call to review performance, give feedback, discuss improvements
- **Monthly:** Review KPIs, discuss goals, identify training needs, give recognition

Key Metrics to Track:

- Tasks completed per day/week
- Response time to enquiries
- Lead qualification accuracy (how many qualified leads convert?)
- Hours worked vs. output delivered

The Goal: Become Unnecessary

A well-trained VA should be able to handle their responsibilities without your daily involvement. If you are still answering every question after 30 days, your training or systems need work - not your VA.

Start Small. Scale Smart.

Begin with 10-20 hours per week on ONE core task. Once your VA masters it, add the next responsibility. This is how you build a reliable team member - not overnight, but over 2-3 months.

Quick Reference: Expected Costs

- VA (20 hrs/week @ \$7/hr): \$140/week = \$560/month
- Tools (Slack, Trello, Loom): Free or ~\$50/month
- Phone system: ~\$25-50/month
- Total investment: ~\$650/month for 10-15 hours of YOUR time back each week

From *Better Business That Works* by Alexei Kouleshov