Are Your "Ducks" In A Row??

Office Virtualization Checklist

PLEASE…consider ALL the items on this checklist BEFORE beginning work with a Virtual Assistant. Doing so will help insure a smooth, hassle-free start to your work together.

Phone System (if answering phones is part of the service requested)

- ☐ Please insure your VA has access to your virtual system or that you are able to set your phones to begin ringing in his/her office when scheduled.
- ☐ If you need help selecting a virtual phone system, please let your VA know so he/she may best prepare for your work together. (He/she should provide several options).
- ☐ Please prepare an 'answering script' if desired.
- ☐ Please prepare answering system information, access, instruction.

Email System (if email management is part of the service requested)

- ☐ Please provide all necessary information/access to your email system.
- ☐ If you need help gathering this information, your VA should be able to help you.
- ☐ Please provide email signature information, font and any logos/clip art requested.

Software

- ☐ Please let your VA know what software you use so he/she may insure knowledge level and access to this software
  - o Keep in mind that any time spent training on 'common' software is not your responsibility, but proprietary software knowledge cannot be expected. Time spent learning proprietary software will usually be billable time.
- ☐ If proprietary software needs to be downloaded, installed – you must provide the software. Please provide information on this software so your VA may check system requirements etc.
- ☐ It is very likely there are a variety of ways to accomplish nearly anything in your business using existing software, a good VA will have suggestions for you if you aren't sure what you need.

Share domains, log ins, passwords

- ☐ Please list all software, domains, accounts that are pertinent to the work you have contracted for including:
  - o Domain name for user access
  - o Log in information (UN, email address, PW)
  - o Customer service information
  - o Account 'secret question' information where applicable

Contact information

- ☐ Please list all phone numbers you may be reached at and priority of use.
- ☐ Please provide email addresses you would like to use.
- ☐ Please provide skype or instant message contact info.
- ☐ Please provide preferred method of communication and times of availability.

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