Virtual Assistant Business Startup Checklist

STARTUP CHECKLIST A Practical Roadmap from Business Idea to First Client

A virtual assistant business is more than remote work. It is an independent service business with its own clients, services, prices, policies, finances, and operating systems.

Use this checklist to understand the major steps involved. Work through them in order, but remember that your early decisions are working drafts. You can revise them as you learn more.

1. Clarify What You Are Building

☐ Understand the difference between owning a VA business and working as a remote employee.

☐ Identify the general type of support you may provide, such as administrative, organizational, communication, technical, creative, or operations support.

☐ Write a simple description of whom you may help, what kind of support you may provide, and the practical problem it solves.

LEARN MORE *Module 1, What a Virtual Assistant Business Is*

2. Make Sure the Business Fits Your Life

☐ Determine how many hours you can realistically devote to the business each week.

☐ Allow time for both client work and unpaid business tasks such as marketing, bookkeeping, and administration.

☐ Identify your schedule, health, workspace, communication, and workload requirements.

☐ Set a realistic starting income goal based on the time you can actually work.

LEARN MORE *Module 2, Business Owner Capacity, Goals, and Fit*

3. Choose Skills and Starter Services

☐ Review your employment, volunteer, education, business, and life experience for transferable skills.

☐ Identify the skills you can already perform at a professional level.

☐ Practice unfamiliar services before offering them to paying clients.

☐ Choose a small starter list of services that fit your skills, interests, and capacity.

☐ Avoid work that requires training, credentials, or expertise you do not yet have.

LEARN MORE *Module 3, VA Skills and Skill-Building Paths*

4. Confirm That Clients Need the Help

☐ Identify the business problems your proposed services would solve.

☐ Describe each service in terms of the client's problem and the result your work supports.

☐ Talk with business owners or potential clients about the work they struggle to keep up with.

☐ Look for repeated needs rather than relying only on assumptions.

☐ Decide whether to move forward, revise the idea, or pause before spending money on formation.

LEARN MORE *Modules 4–5, Client Problems, Market Fit, and Starter Services and The Viability Checkpoint Before Formation*

5. Establish the Business Foundation

☐ Choose an appropriate business structure and obtain professional guidance when needed.

☐ Select and check your business name before using it publicly.

☐ Complete the required state, county, city, licensing, or registration steps for your location.

☐ Apply for an EIN when appropriate and in the correct order.

☐ Open a separate business bank account and establish a basic bookkeeping system.

☐ Plan for taxes, insurance, renewals, and important business records.

LEARN MORE *Modules 6–7, Business Structure, Naming, and Formation and The Financial Foundation*

6. Define What You Sell and How You Work

☐ Turn your starter services into clear offers with defined results and boundaries.

☐ Choose a pricing method that accounts for your time, expenses, and available capacity.

☐ State what each service includes, what it excludes, and how additional requests will be handled.

☐ Prepare a written client agreement and have it reviewed by an appropriate professional.

☐ Establish payment terms, communication expectations, confidentiality practices, and access rules.

LEARN MORE *Modules 8–9, The Professional Relationship and Offers, Packages, and Pricing*

7. Build a Simple Operating System

☐ Create a basic process for moving a prospect from inquiry to completed client work.

☐ Set up business email, calendar, file storage, task tracking, invoicing, and electronic signatures.

☐ Create a simple lead tracker and an organized folder structure for each client.

☐ Use secure passwords, multifactor authentication, backups, and safe methods of receiving client access.

☐ Test the process before using it with a paying client.

LEARN MORE *Module 10, The Operating System: Process Before Tools*

8. Create a Credible Public Presence

☐ Write a clear business description focused on the clients and problems you support.

☐ Create a basic website, landing page, or professional profile.

☐ Explain your services in plain language without exaggerating your experience.

☐ Prepare truthful work samples or portfolio examples.

☐ Make it easy for potential clients to contact you or request a conversation.

LEARN MORE *Module 13, Brand and Public Presence*

9. Find and Qualify Potential Clients

☐ Start with people, businesses, and professional communities where relevant relationships already exist.

☐ Use a small, repeatable marketing routine rather than trying to be active everywhere.

☐ Track inquiries, referrals, conversations, follow-up dates, and next steps.

☐ Screen opportunities for poor fit, vague expectations, scams, and employee-like working arrangements.

☐ Use discovery conversations to determine whether the client, problem, scope, and budget fit your business.

Your first client usually comes from a direct conversation with someone you already know, not a marketing campaign — so start there.

LEARN MORE *Modules 14–15, Marketing and Finding Clients and The Discovery Call*

10. Sign and Start the Client Correctly

Before beginning paid work, confirm that:

☐ The service, scope, price, deadlines, and responsibilities are clear.

☐ The agreement has been signed.

☐ Required payment has been received.

☐ The client has completed the intake process.

☐ Necessary information and access have been provided securely.

☐ Communication, task-submission, and progress-update expectations are understood.

LEARN MORE *Modules 11–12, From Conversation to Paying Client and Onboarding and the First Engagement*

After You Launch

Once you begin working with clients:

☐ Provide consistent updates and track work, time, payments, and deadlines.

☐ Address missing information, urgent requests, scope changes, and late payments promptly.

☐ Review your services, pricing, clients, expenses, capacity, and systems regularly.

☐ Grow, specialize, or hire help only after the business has proven what works.

LEARN MORE *Modules 16–18, Managing Active Clients, Reviewing the Business Before Growing It, and Growing on a Foundation Worth Growing*

Before Accepting Your First Paying Client

You should be able to confirm that:

☐ You understand the service you are offering.

☐ You have the skill and capacity to deliver it.

☐ Your business and financial foundation are in place.

☐ Your price, scope, contract, and payment process are ready.

☐ Your client files, tasks, communication, and security systems are ready.

☐ You know how the client will move from inquiry to onboarding and active work.

THE BOTTOM LINE

> You do not need a perfect business before you begin. You need a business that is clear, prepared, professional, and ready to keep its promises.

GET THE FULL BOOK

This checklist maps the journey. The Business of Virtual Assistance: How to Start, Structure, and Run Your Own Virtual Assistant Business walks every stage in depth — the reasoning, decisions, examples, safeguards, and systems behind each step. No course, no coaching, no catch: buy the book once and you own the entire system.

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