Your VA Operating System

TOOL GUIDE A tool guide for choosing the software you actually need

INTRODUCTION

Virtual assistants have access to hundreds of software products, but a successful VA business does not require dozens of subscriptions.

The purpose of this guide is to help virtual assistants identify a small, practical collection of tools based on the work they actually perform. It is not intended to be an exhaustive software directory or a checklist of products every VA must purchase.

A beginning VA generally needs:

- One primary office and communication system
- One project or task-management tool
- One secure file-storage system
- One invoicing method
- One password manager
- One time tracker when billing hourly
- Appropriate security protections

CRM platforms, automation systems, social-media schedulers, proposal software, and advanced knowledge-management tools can be added when the VA has a recurring workflow that justifies them.

The categories and selection approach in this guide are based on the earlier software report, which organized products according to the work a VA needs to accomplish rather than alphabetically or by software type.

This guide recommends the tools to start with. For an expanded, filterable catalog — every tool in this guide plus dozens more options — see the companion software database, a Google Sheet you can copy:

Open the software database →

PLEASE CONFIRM DETAILS YOURSELF

> Software features, pricing, plan limits, integrations, and availability change frequently, and details can become outdated or vary by region. It is the reader's responsibility to verify all information directly with each provider before subscribing to, relying on, or recommending any tool. FlatTail Media is not responsible for inaccurate, outdated, or misleading information; makes no endorsement or recommendation of any product; and earns nothing from this guide — no affiliate links, no commissions. This is educational content, not legal, tax, or security advice.

HOW TO USE THIS GUIDE

ESSENTIAL

An essential category supports work that must be completed, coordinated, billed, documented, or secured.

"Essential" does not mean that every listed product is required. The products within a category are usually alternatives.

For example, a VA may use Google Workspace or Microsoft 365. Most beginning VAs do not need to subscribe to both independently.

ADD WHEN NEEDED

These tools become useful after a recurring need, bottleneck, or client requirement appears.

A scheduling platform, for example, may not be necessary until the VA begins conducting regular discovery calls or managing appointments.

SPECIALIZED OR ADVANCED

These products serve a particular service specialty, larger team, complex client environment, or technically advanced workflow.

They should normally be adopted only when a specific business need justifies the additional cost and learning curve.

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

1 · Communication & office productivity

START HERE: Google Workspace

Paid subscription · Web + desktop/mobile apps

Best for VAs and clients who already work primarily in Google.

- Advantage — Gmail, Calendar, Meet, Drive, and Docs/Sheets/Slides in one place; easy collaborative editing.
- Caution — Manage files, folders, and shared links carefully so ownership and permissions stay clear.

STRONG ALTERNATIVE: Microsoft 365

Paid; many plans · Web + desktop/mobile apps

Best for clients whose operations run on Office, Windows, Outlook, or Teams.

- Advantage — Strong compatibility with traditional business documents and spreadsheets.
- Caution — Many personal, business, Teams, and enterprise plans — verify which features are included before subscribing.

ADD WHEN NEEDED

- **Slack —** team and client communication organized into channels
- **Zoom —** external video meetings, screen sharing, and presentations
- **Loom —** recorded instructions, demonstrations, and handoffs

- **Microsoft Teams —** best when the client already operates in Microsoft 365

2 · Scheduling & appointments

START HERE: Calendly

Free tier; paid for teams/advanced · Web + apps

Best for discovery calls, client meetings, and simple appointment scheduling.

- Advantage — Booking links, availability rules, reminders, and buffers that are easy for both sides.
- Caution — Team scheduling, routing, and multiple calendars may require a paid plan.

STRONG ALTERNATIVE: Google Appointments / Microsoft Bookings

Included with Workspace / M365 · Web

Best for VAs who want to avoid adding another platform, or Microsoft-centered clients with several staff.

- Advantage — Uses a calendar you already have, so there's nothing extra to learn.
- Caution — Fewer advanced booking features than a dedicated scheduler.

ADD WHEN NEEDED

- **Acuity Scheduling —** service businesses needing intake forms, classes, packages, or payments
- **Doodle —** meetings involving several participants
- **Cal.com —** users who want more customization or technical control

3 · Project & task management

START HERE: Trello

Free tier; paid for advanced · Web + apps

Best for client onboarding, content calendars, recurring task lists, and simple stages.

- Advantage — Visual boards, lists, and cards that a beginner or client understands immediately.
- Caution — Complex dependencies, reporting, and multi-project oversight may outgrow it.

STRONG ALTERNATIVE: Asana

Free tier; paid for advanced · Web + apps

Best for structured projects with several steps, deadlines, or contributors.

- Advantage — More structure than Trello without immediately becoming an enterprise system.
- Caution — Advanced reporting, portfolios, and admin features generally require paid plans.

ADD WHEN NEEDED

- **ClickUp —** a broad operations workspace: tasks, docs, dashboards, time, automation
- **monday.com —** highly visual, customizable client workflows
- **Todoist —** personal task management and small shared lists
- **Basecamp —** simplified team and client collaboration

4 · Time tracking

START HERE: **Toggl Track**

Free tier; paid for advanced · Web + apps

Best for solo VAs and small teams that bill by the hour.

- Advantage — Fast, polished, and easy to learn, with reports and calendar views.
- Caution — Advanced billing, reporting, and administration may require a paid plan.

STRONG ALTERNATIVE: **Clockify**

Generous free plan · Web + apps

Best for cost-conscious VAs or teams needing a generous free option.

- Advantage — Strong free-plan capacity for timers, timesheets, projects, and reports.
- Caution — Reporting and interface can feel less refined than Toggl Track.

ADD WHEN NEEDED

- **Harvest —** a direct link between tracked time, project budgets, and invoices
- **Everhour —** time tracking embedded inside a compatible project tool
- **Hubstaff —** contractor teams needing scheduling and workforce admin
- **Timely —** automatic activity capture for people who forget to start timers

A NOTE ON ACTIVITY MONITORING

> Employee-style activity monitoring should never be turned on casually. Consider expectations, privacy, consent, and the independent-contractor relationship before using any monitoring features.

5 · Invoicing & payments

START HERE: **Zoho Invoice**

Free · Web + apps

Best for beginning VAs who need a capable invoicing system with no immediate cost.

- Advantage — Branded invoices, estimates, recurring billing, reminders, and client portals.

- Caution — Full bookkeeping and accounting may need a separate accounting platform.

STRONG ALTERNATIVE: **Wave**

Low-cost / free invoicing · Web

Best for solo service businesses seeking a low-cost starting system.

- Advantage — Invoicing, estimates, payment acceptance, and some bookkeeping in one place.
- Caution — Features and availability can differ by country and plan.

ADD WHEN NEEDED

- **FreshBooks —** connected invoicing, expenses, time, and client communication
- **QuickBooks Online —** fuller accounting and accountant collaboration
- **Stripe —** flexible online payments, payment links, and subscriptions
- **Wise Business —** international payments and currency conversion

PAYMENTS ARE NOT ACCOUNTING

> A payment processor is not an accounting system. You still have to keep proper income, expense, tax, and business records.

6 · File storage & collaboration

START HERE: **Google Drive**

Free tier / included with Workspace · Web + apps

Best for Google-centered clients and collaborative document production.

- Advantage — Easy real-time editing and sharing.
- Caution — Poorly controlled shared links create security, ownership, and offboarding problems.

STRONG ALTERNATIVE: **Microsoft OneDrive**

Included with M365 · Web + apps

Best for Microsoft Office and Windows-centered clients.

- Advantage — Strong integration with Word, Excel, PowerPoint, and Microsoft accounts.
- Caution — Keep personal OneDrive, business OneDrive, SharePoint, and client accounts clearly separated.

ADD WHEN NEEDED

- **Dropbox —** straightforward file sync and external delivery
- **Box —** business content management and stronger admin controls
- **Sync.com —** privacy-conscious storage and file exchange
- **iCloud Drive —** Apple-centered personal workflows

THE FILE-MANAGEMENT STANDARD

> For every client, define up front: who owns the files, where originals live, the folder structure and naming convention, permission levels, backup responsibility, version control, and what happens at offboarding. Where practical, final records should stay in accounts the client owns.

7 · CRM & lead tracking

START HERE: Bigin by Zoho CRM

Free (1 user, ~500 records); paid tiers · Web + apps

Best for solo VAs and small agencies who need more than a spreadsheet but less than a full CRM.

- Advantage — Pipeline-centered and small-business focused: contacts, companies, activities, and workflows without heavy setup.
- Caution — The free plan is one user with lower limits; verify current pipeline, record, and automation limits before you rely on them.

STRONG ALTERNATIVE: HubSpot CRM

Strong free entry; paid grows · Web + apps

Best for a VA whose pipeline may later connect to email marketing, forms, or service tools.

- Advantage — Generous free entry point and extensive free training.
- Caution — Costs can climb considerably once advanced automation, reporting, or extra products are needed.

ADD WHEN NEEDED

- **Zoho CRM (full) —** more customization, reporting, roles, and sales-process control
- **Freshsales —** a sales CRM with pipelines, email, and automation (Freshworks)
- **Streak —** basic contact and pipeline tracking inside Gmail
- **Pipedrive —** sales-focused workflows built around deal stages
- **Capsule CRM —** a straightforward contact and relationship database

WHEN TO ADOPT A CRM

> A new VA doesn't automatically need one — a spreadsheet or task board is often enough at first. Move to a CRM when follow-ups get missed, prospects are hard to find, several conversations run at once, or proposal and onboarding stages need tracking.

8 · Automation & integration

START HERE: Zapier

Free tier; scales with task volume · Web

Best for beginning automation and common app-to-app connections.

- Advantage — Large integration catalog and many ready-made templates.
- Caution — Costs rise as task volume and workflow complexity grow.

STRONG ALTERNATIVE: Make

Free tier; more technical · Web

Best for users who have outgrown simple trigger-and-action workflows.

- Advantage — Strong control over multi-step processes with branching and error handling.
- Caution — More technical and less beginner-friendly than Zapier.

ADD WHEN NEEDED

- **Microsoft Power Automate —** Microsoft 365 and Windows-centered processes
- **IFTTT —** simple personal or consumer-app automations
- **n8n —** technically advanced or self-hosted automation
- **Pabbly Connect —** an alternative pricing and workflow-allowance model

DON'T AUTOMATE A MESS

> Automate only a stable, documented process. First run it manually, write down the correct steps, remove the unnecessary ones, confirm who owns the data, and test it — then automate the stable parts and build a way to catch failures.

9 · SOPs, notes & knowledge

START HERE: Notion

Free personal; paid for teams · Web + apps

Best for standard operating procedures, client portals, content databases, and process libraries.

- Advantage — Flexible pages, databases, and wikis that present well.
- Caution — It's easy to spend more time building an elaborate system than doing the work.

STRONG ALTERNATIVE: Microsoft OneNote

Free / included with Microsoft · Web + apps

Best for meeting notes, screenshots, research, and flexible personal documentation.

- Advantage — Mature, widely available, and often already included with Microsoft products.

- Caution — Naming and archiving rules are needed to prevent notebook clutter.

ADD WHEN NEEDED

- **Google Keep —** rapid temporary notes and checklists
- **Obsidian —** durable local Markdown notes and personal knowledge
- **Evernote —** web clipping, scanning, and document capture with search
- **Craft —** attractive client-facing notes and documents

10 · Password management

START HERE: Bitwarden

Strong free plan; low-cost paid · Web + apps + browser

Best for cost-conscious VAs needing secure credentials across devices.

- Advantage — Strong free functionality and broad platform support.
- Caution — Shared access must be configured carefully so each person gets only what they need.

STRONG ALTERNATIVE: 1Password

Paid (no permanent free plan) · Web + apps + browser

Best for VAs and teams that prioritize ease of use and managed access.

- Advantage — Polished vaults, secure sharing, and strong onboarding.
- Caution — No broad permanent free plan like Bitwarden's.

ADD WHEN NEEDED

- **Proton Pass —** privacy-focused password management
- **Dashlane —** polished consumer and small-team management
- **Keeper —** business administration and compliance features
- **NordPass —** an alternative from the Nord ecosystem

NEVER SEND PASSWORDS THE CASUAL WAY

> Passwords should not travel through ordinary email, chat messages, shared documents, or spreadsheets. Use the password manager's sharing instead.

11 · Cybersecurity

START HERE: Microsoft Defender + MFA

Included with Windows · Desktop

Best for a practical baseline for many Windows-based VAs.

- Advantage — Built-in protection at no extra cost, paired with multi-factor authentication everywhere.
- Caution — Security is never one app — see the minimum checklist near the end of this guide.

STRONG ALTERNATIVE: **Malwarebytes / Bitdefender**

Free scan / paid real-time · Desktop + mobile

Best for extra scanning and removal, or broader multi-device protection.

- Advantage — Adds real-time protection beyond the built-in baseline.
- Caution — Real-time and multi-device features require paid plans.

ADD WHEN NEEDED

- **Proton VPN (or similar) —** working on public or untrusted networks (not a replacement for antivirus, updates, MFA, or backups)
- **Cloudflare WARP —** encrypts traffic between your device and Cloudflare's network; also fits client-managed Zero Trust setups
- **Backblaze (or similar) —** off-site backup of your primary computer

12 · Design, marketing & social media

START HERE — DESIGN: **Canva**

Free tier; paid Pro · Web + apps

Best for VAs who aren't designers but need polished everyday graphics and documents.

- Advantage — Templates allow fast production of social graphics, presentations, and lead magnets.
- Caution — Follow client brand and licensing rules; unmodified popular templates can look generic.

START HERE — PUBLISHING: **Buffer**

Free tier; paid for more channels · Web + apps

Best for beginning social support on a limited number of channels.

- Advantage — Clean, approachable scheduling, approvals, and analytics.
- Caution — Costs increase as brands, channels, and features are added.

STRONG ALTERNATIVE: **Metricool**

Free tier; paid · Web + apps

Best for VAs managing several platforms or producing recurring client reports.

- Advantage — Combines scheduling, analytics, inbox, and reporting.
- Caution — More moving parts than a single-purpose scheduler.

ADD WHEN NEEDED

- **Mailchimp —** small newsletters and introductory email marketing
- **Brevo —** email volume, automation, forms, and optional SMS
- **Later —** visually focused brands and media libraries

A SCHEDULER DOESN'T MAKE YOU A STRATEGIST

> Strategy, copywriting, paid advertising, SEO, community management, and content production are separate skills — offer them only when you can perform them responsibly.

13 · Proposals, contracts & e-signatures

START HERE: PandaDoc

Free e-sign tier; paid for advanced · Web

Best for VAs who want a connected proposal-to-signature workflow.

- Advantage — Proposals, quotes, reusable templates, approvals, and e-signatures together.
- Caution — Advanced proposal, CRM, and team features may require paid plans.

STRONG ALTERNATIVE: DocuSign

Paid; sending limits · Web + apps

Best for clients who already use or require DocuSign.

- Advantage — Broad business familiarity and solid e-signature routing and audit records.
- Caution — Sending limits and plan costs may be excessive for a solo VA who sends agreements rarely.

ADD WHEN NEEDED

- **Dropbox Sign —** straightforward signatures and Dropbox-centered workflows
- **Adobe Acrobat Sign —** PDF-heavy client work
- **Bonsai —** connected proposals, contracts, projects, and invoices
- **Proposify —** proposal-heavy agencies or sales-support services

SOFTWARE IS NOT LEGAL ADVICE

> Tools can standardize the document process, but contracts and templates must be appropriate for your business, services, and jurisdiction. Get legal advice for the agreement itself.

14 · Training & professional development

START HERE: HubSpot Academy

Free · Web

Best for developing practical marketing, sales, and service-support skills.

- Advantage — Free courses and certifications across marketing, sales, service, and CRM use.
- Caution — Certifications are provider credentials, not licenses.

STRONG ALTERNATIVE: Google Skillshop / Microsoft Learn

Free · Web

Best for training tied to Google (ads, analytics) or Microsoft 365 and Power Platform environments.

- Advantage — Free, official training aligned to tools clients actually use.
- Caution — Focused on each vendor's own ecosystem.

ADD WHEN NEEDED

- **LinkedIn Learning —** broad professional and software training
- **Coursera —** longer university- or company-developed programs
- **Udemy —** narrow, application-specific courses

DON'T COLLECT COURSES

> Choose training that supports a service you'll offer, a tool a client uses, a weakness that blocks professional delivery, or a specialty with real market demand.

EXAMPLE STARTER STACKS

Examples, not required packages — adapt to the work you do and the tools your clients already use.

LEAN SOLO VA

Google Workspace or Microsoft 365 · Trello · Clockify · Zoho Invoice · Google Drive or OneDrive · Bitwarden · Microsoft Defender + MFA · Bigin only once lead volume justifies a CRM

GOOGLE-CENTERED

Google Workspace · Google Calendar appointment schedules · Google Drive · Trello or Asana · Bigin or HubSpot CRM · Zapier · Bitwarden · PandaDoc

MICROSOFT-CENTERED

Microsoft 365 · Microsoft Bookings · OneDrive · Microsoft Planner, Trello, or Asana · Bigin or HubSpot CRM · Power Automate · 1Password or Bitwarden · Adobe Acrobat Sign or DocuSign

OPERATIONS-SUPPORT VA

Microsoft 365 or Google Workspace · Asana or ClickUp · Toggl Track · Bigin · Notion · Zapier or Make · Bitwarden or 1Password · PandaDoc

MARKETING-SUPPORT VA

Google Workspace · Asana or Trello · Canva · Buffer or Metricool · Mailchimp or Brevo · Google Drive · Toggl Track · Bitwarden

HOW TO CHOOSE A TOOL — A SHORT SEQUENCE

- Define the workflow and the result you want.
- Check whether the client already has an approved tool.

- Check whether existing software (Google, Microsoft, or a current subscription) already does it.
- Shortlist no more than three options.
- Compare total cost, ease, client access, permissions, platform fit, integrations, and export.
- Pilot one product on one real workflow for 14–30 days.
- Keep it only if it saves time, reduces errors or risk, or measurably improves the client experience.
- Document the workflow in a short SOP, and review the subscription quarterly.

Quick gut-check before adopting: What specific problem does it solve, and is it needed now? Can something you already pay for do it? How is it priced (per user, client, or usage), and what's excluded from the entry plan? Can the client book, upload, approve, or sign easily? Does it support MFA and limited permissions, who owns the data, and can you export it and remove access cleanly?

THE MINIMUM SECURITY CHECKLIST

Pass this gate before you handle client information:

☐ Use unique passwords, kept in a dedicated password manager.

☐ Enable multi-factor authentication everywhere it's offered.

☐ Encrypt your computer and mobile devices.

☐ Install operating-system and software updates promptly.

☐ Keep antivirus / endpoint protection active.

☐ Verify unexpected payment, password, or file-sharing requests before acting.

☐ Separate client accounts and files; use the minimum permissions necessary.

☐ Back up important business information — and test that a restore works.

☐ Remove access promptly at offboarding.

☐ Document suspected incidents and notify the appropriate client contact.

This mirrors the small-business guidance from CISA and the NIST Cybersecurity Framework: identify what matters, protect it, and be able to detect, respond, and recover.

REVIEW YOUR SOFTWARE QUARTERLY

At least every quarter, list each product with its cost, its business purpose, the last time you meaningfully used it, how many clients or workflows use it, any overlap with other tools, its active users and permissions, its MFA status, who owns the data, its export/backup status, and its renewal date — then decide whether to keep, downgrade, replace, or cancel it. Remove inactive client accounts and unnecessary access promptly.

THE FINAL PRINCIPLE

> Use the simplest reliable system that protects client information, supports consistent work, and can be maintained without unnecessary complexity. Don't buy software to feel prepared — adopt a tool when a real, repeatable business process requires it.

THE FULL SOFTWARE DATABASE

Every tool in this guide plus dozens of additional and specialized products live in a companion software database — filterable by category, tier, and cost. It's a Google Sheet you can copy:

Open the software database →

GET THE FULL BOOK

The Business of Virtual Assistance: How to Start, Structure, and Run Your Own Virtual Assistant Business walks the entire journey in depth — the reasoning, decisions, examples, safeguards, and systems behind starting and running a VA business. No course, no coaching, no catch: buy the book once and you own the entire system.

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