🗂️ Virtual Assistant Client Onboarding Template

# 📌 Client Information

* Full Name:
* Company/Business Name:
* Email Address:
* Phone Number:
* Preferred Communication Method (Email, WhatsApp, Slack, etc.):
* Time Zone:
* Social Media Handles (if applicable):

# 💼 Project or Service Details

* Type of Services Required (e.g., Administrative Support, Email Management, Calendar Scheduling, etc.):
* Project Start Date:
* Expected Duration or Ongoing:
* Working Hours/Availability Preference:
* Number of Weekly Hours Required:

# 🛠️ Tools & Access

Please indicate the tools you currently use and provide access details if necessary (via a secure method such as LastPass):

|  |  |  |  |
| --- | --- | --- | --- |
| Tool | Use | Access Needed | Notes |
| Google Workspace |  | Yes/No |  |
| Microsoft 365 |  | Yes/No |  |
| Trello/Asana |  | Yes/No |  |
| Slack/Teams |  | Yes/No |  |
| Canva |  | Yes/No |  |
| CRM (e.g., HubSpot, Zoho) |  | Yes/No |  |
| Social Media Platforms |  | Yes/No |  |

# 🔐 Confidentiality and Agreement

* Do you require an NDA (Non-Disclosure Agreement)? Yes / No
* Have you reviewed and accepted the service agreement/contract? Yes / No
* Any specific confidentiality or data protection protocols?

# 📆 Meeting Preferences

* Preferred Day(s) for Check-ins:
* Preferred Time for Meetings:
* Meeting Frequency:

☐ Weekly  
☐ Bi-Weekly  
☐ Monthly  
☐ As Needed

# 🧾 Invoicing & Payment

* Billing Cycle:
* Preferred Payment Method (PayPal, Wise, Bank Transfer, etc.):
* Currency:
* Invoice Contact Email (if different):

☐ Weekly  
☐ Bi-Weekly  
☐ Monthly

# Additional Notes or Expectations

Please share any preferences, special instructions, or goals you'd like me to be aware of.