ONBOARDING SUCCESS

FOR X VIRTUAL ASSISTANTS

X Virtual Assistants

WHY IT MATTERS

The success of your XVA partnership is started in Days 1–7. Get these right and you'll:

- **Build Trust Instantly**. A clear kickoff shows your XVA you value their time and talent.
- **Establish Communication.** No more endless back-and-forth—set your style from the start.
- **See ROI Quickly.** Early wins prove you made the right choice and free you up to focus on growth.

Quick Fact: Managers who invest just 10 minutes daily in structured onboarding reclaim an average of 7 hours per week within the first month.

With **X Virtual Assistants**, you don't just hire any VA —you get a top-1% Filipino professional backed by a custom-trained GPT co-pilot that already knows your brand, systems, and SOPs.

X VIRTUAL ASSISTANTS

HOW TO
USE GUIDE

1. **One Page = One Focus**
   a. Each page delivers a single objective, clear actions, and pro tips—no fluff.

2. **Speak Your Way**
   a. Use Loom, voice note, chat, or email—whatever feels most natural to you.

3. **Lean on AI**
   a. Your XVA's GPT co-pilot can summarize SOPs, draft checklists, and answer routine questions in seconds for your new XVA.

Client Snapshot:

"By Day 3, my VA used the X GPT to build a draft onboarding checklist. I saved 90% of the setup time!"
— Maria T., E-commerce Founder

XIRTUAL ASSISTANTS

DAY 1
KICKOFF

Objective: Humanize & Align

- **15-Min Kickoff Video Chat:** Join a brief video call with you, your new XVA, and your dedicated Client Success Manager to introduce everyone and discuss high-level goals.

- **State Expectations:** Clearly outline preferred response times, daily check-in format, and any non-negotiable preferences.

- **Invite Questions:** Encourage your XVA to ask anything that isn't 100% clear—early questions lead to fewer mistakes.

- **Pro Tip:** A fun personal detail (favorite coffee mug, home office view) builds rapport faster than any SOP.

XIRTUAL ASSISTANTS

DAY 2
FIRST WIN

1. **Objective:** Build Confidence with a Quick Win

2. **Choose a Simple Task:** Examples: tidy your inbox, organize your calendar, or compile a list of 5 top-performing posts.

3. **Clarify & Delegate:** Attach your Loom or outline the steps. Remind them the GPT co-pilot can clarify at any time.

4. **Review & Praise:** Send a "Great work!" note as soon as they finish. Acknowledgment fuels momentum.

5. **Document Steps:** Ask your VA to jot down how they did it— GPT can turn it into a first-draft SOP.

VIRTUAL ASSISTANTS

DAY 3
WORKFLOW

1. **Objective:** Establish Rhythm & Repeatable Process
2. **Lock in Updates:** Decide on end-of-day recaps via chat, Loom, or email—your choice.
3. **Assign a Recurring Task:** For example, a weekly lead list update or project status report.
4. **Document as You Go:** Ask your VA to record each step; the GPT co-pilot can polish it into a workflow guide.
5. **Add One More Item:** Introduce a slightly larger responsibility, like drafting a social media outline.
6. **Tip Box:** Use "Progress / Problems / Plan" for your daily update:
   a. **Progress:** Wins today
   b. **Problems:** Roadblocks
   c. **Plan:** Tomorrow's focus

DAY 4
OWNERSHIP

1. **Objective:** Shift from "Do" to "Own"

2. **Ask for Input:** "If you could improve this process, what would you change?"

3. **Co-Create with AI:** Have your VA prompt the GPT co-pilot to suggest new checklists or templates.

4. **Hand Off a Full Workflow:** Let them run with one end-to-end process—e.g., onboarding a new lead.

5. **Set KPIs:** Define one clear metric (response time, error rate) so they own both tasks and outcomes.

6. **Why Ownership Works:** People excel when they feel trusted—and they stay longer when they feel responsible.

DAY 5
FEEDBACK

1. **Objective:** Cement a Positive Feedback Loop
2. **Use SBI Model:**
    a. **Situation:** "Regarding yesterday's calendar setup..."
    b. **Behavior:** "...you color-coded all events..."
    c. **Impact:** "...which helped me visually prioritize client meetings."
3. **Balance Praise & Tweaks:** Two strengths for every improvement suggestion.
4. **Encourage Logging:** Have your VA record feedback and updates via their GPT for future reference.
5. **Sidebar:** Waiting more than 24 hours to give feedback cuts productivity by 40%.

VIRTUAL ASSISTANTS

DAY 6
SCALE UP

1. **Objective:** Offload Bigger Blocks of Time

2. **Delegate a Project:** Examples: draft a weekly newsletter, manage routine client follow-ups, or prep a data report.

3. **Challenge Efficiency:** "How can your GPT co-pilot streamline this further?"

4. **Confirm Full Ownership:** "Do you feel ready to own this each week without my input?"

5. **Celebrate the Shift:** Acknowledge the expanded role and the time you've reclaimed.

6. **Client Win:** "By Day 6, I regained 5 hours of work—and my VA boosted my follow-up rate by 30%."

7. — Emma S., SaaS Consultant

VIRTUAL ASSISTANTS

DAY 7
REFLECT

1. **Objective:** Review, Celebrate & Plan Ahead

2. **Mutual Check-In:**

   a. **You:** "What's still on my plate?"

   b. **XVA:** "Where could I use more clarification?"

3. **Set Priorities:** Co-create a list of 2–3 new tasks to delegate next.

4. **Share a Win:** Highlight a key result—time saved, leads captured, stress reduced.

5. **Reflection Prompt:**

   a. "If you could delegate just one MORE thing this week, what would it be?"

XIRTUAL ASSISTANTS

BUILD TRUST

5 Dos & Don'ts

1. **Do** over-communicate context. Don't assume they know your backstory.
2. **Do** praise small wins. Don't wait to share improvements.
3. **Do** leverage your time. Keep delegating so you can focus on more high-level tasks.
4. **Do** empower suggestions. Don't micromanage details.
5. **Do** schedule weekly reviews. Don't let issues linger.
6. **Pro Tip:** A 5-minute video chat at the start and end of each day can make all the difference.

XIRTUAL ASSISTANTS
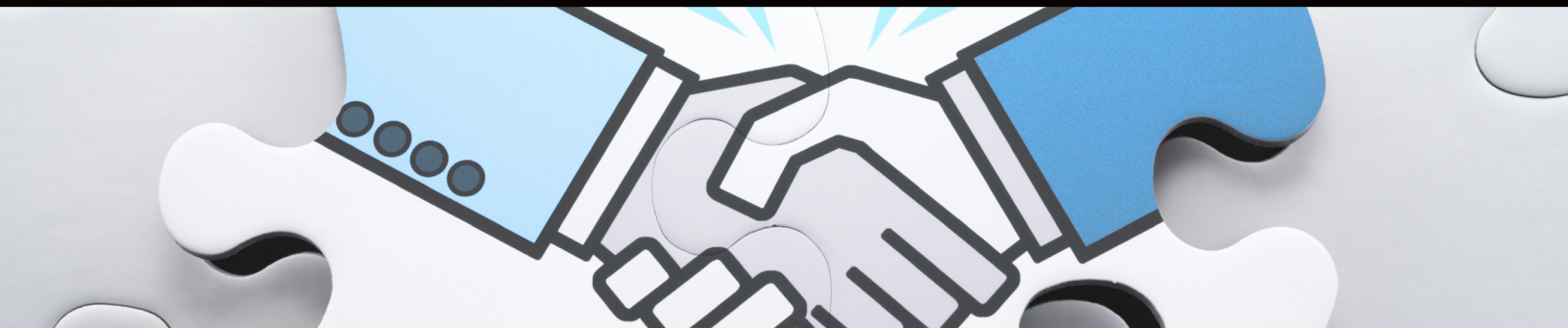
XVA +
GPT POWER

Why This Combo Wins

1. **Speed:** Your XVA ramps up in hours, not weeks.
2. **Precision:** Custom GPT knows your brand voice and SOPs.
3. **Scalability:** Replicate this onboarding with each new XVA.
4. **Support:** Your dedicated Client Success Manager ensures smooth sailing.
5. **Guarantee:** If it's not a perfect match in 30 days, we replace your XVA at no extra cost.

XIRTUAL ASSISTANTS

NEXT STEPS

You've unlocked a proven system. Now:

1. **Apply Daily:** Use this guide each time you hire a new XVA.
2. **Track Results:** Log hours saved, tasks offloaded, and revenue gained.
3. **Scale Confidently:** Ready for a second XVA or deeper GPT features? Contact your Client Success Manager to discuss the next level of support.

Let's grow your business—while you reclaim your time.

— Team X Virtual Assistants

X VIRTUAL ASSISTANTS

BREAK THE CYCLE

LEVERAGE YOUR TIME WITH

X IRTUAL ASSISTANTS