The VA Role-Scoping *Template*

Great placements start with a clear brief. Fill this in before you hire anyone, through VAverse or on your own. If you can't fill a section, that's the conversation to have first.

1. The outcome

In one sentence, what will be true in 90 days if this hire works?

2. The tasks, sorted

Hand over completely	Hand over with my sign-off	Keep myself

3. The tools they'll live in

- ☐ Inbox and calendar:
- ☐ CRM:
- ☐ Project or task tool:
- ☐ Website, funnel or email platform:
- ☐ Anything else:

4. Hours and overlap

Hours per week: _____ Must overlap with my working hours? Yes / No Time zone that matters most: _____

5. The kind of person

They must be	They must not be

6. The first two weeks

- [ ] Week 1, they'll shadow:
- [ ] Week 2, they'll own:
- [ ] How we'll check in (daily note, weekly call):

7. Budget

Monthly pay range you're comfortable with (paid directly to them): _____ Placement fee budget: _____

Done? Send it with your enquiry and the shortlist comes back faster.

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