The 48-Hour VA Launch Plan

SECTION 1: CLARITY (15–20 min)

Goal: Tell us what your VA is doing FIRST

Pick your **FIRST 3** tasks for your VA
(Do NOT overthink this)

Choose from:

- □ Quoting personal lines
- □ Inbox management
- □ Rehops / renewals
- □ Customer service (calls/texts)
- □ CRM updates/ Lead follow-up
- □ Mortgagee Follow Ups
- □ Processing COI's

👉 **Write your top 3**:

1. _____
2. _____
3. _____

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The 48-Hour

VA Launch Plan

SECTION 2: AGENCY SNAPSHOT (10 min)

Goal: Give your VA basic context so they aren't lost

Fill this out quickly:

- Agency Name: _____
- AMS / CRM: _____
- Carriers: _____
- Personal Lines Focus: Yes / No
- Commercial Lines Focus: Yes / No

Some resource guides that will be helpful for you:

👉 **Agency Matrix Guide**

👉 **Agency Matrix Template**

👉 **Priority List & Daily Schedule Template**

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SECTION 3: ACCESS (CRITICAL) (15–20 min)

Goal: VA can actually WORK

Give access to:

- □ Email
- □ CRM / AMS
- □ Carrier portals
- □ VoIP / Dialer
- □ Shared Drive (Google Drive/ Microsoft OneDrive)

👉 **Securely Sharing Passwords**:

- We recommend using LastPass for password management. It starts at $3/ month and is extremely secure.
- You will log in to the sites yourself, save the logins to Lastpass, and then use Lastpass to share the code with your VA. They never have your login credentials, but just a code to log in with. This is the most secure way to onboard someone and share access.

👉**If you don't want to use Lastpass, set up a shared Spreadsheet with passwords**:

- Logins Doc: "Agency Logins – [Your Name]"

👉 **Security Rule**:

- Keep track of every password shared by adding it to the spreadsheet to share it with the VA. Know exactly what you are sharing access with
- Change passwords after offboarding

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VA Launch Plan

SECTION 4: FIRST TASK SETUP (30 min max)

Goal: VA starts producing TODAY

Pick ONE task to start with:

Example: Inbox Management

- Create label: “VA – To Handle.”
- VA processes:
  - Quotes
  - Service requests
  - Follow-ups

Example: Quoting

- Give:
  - Carrier list
  - Sample client
  - Quote guidelines

Example: Follow-Ups

- Provide:
  - List of leads or clients
  - Script (or “be conversational”)

👉 **Keep it SIMPLE. Do not build SOPs yet.**

The 48-Hour

VA Launch Plan

SECTION 5: ONBOARDING CALL WITH YOUR VA (30 min)

Keep This **SUPER SIMPLE**:

1. “Here’s what success looks like this week”
2. Walk through:
    - Tools
    - First task
3. Let them ask questions
4. Confirm:

👉 **“Start today”**

The 48-Hour

VA Launch Plan

SECTION 6: DAILY COMMUNICATION (5 min setup)

Pick where you want communication to be:

- Slack
- Email
- Other. (It doesn't matter WHERE you chat, just give your new team member the best way to begin reaching you)

Set expectation:

👉**"End of day report with what you completed + questions"**

The 48-Hour

VA Launch Plan

SECTION 7: FIRST 48-HOUR WIN

GOAL:

👉 **VA completes 1–2 real tasks successfully**

Examples:

- Process 10 emails
- Run 5 quotes
- Follow up with 20 leads
- Update CRM for 25 contacts

We are firm believers in the “fire fast” method of thinking. You will know fairly quickly if this person is going to be the right fit. There are a few things to key in on most:

1. If there is a skill issue, that is less serious. If they are close, but not 100%, our team can help you train someone up
2. If there is a character issue (ex: not working their full amount of time, slow responses, etc), then this is likely a bigger problem, and we recommend replacing them immediately

The 48-Hour

VA Launch Plan

✗ WHAT NOT TO DO YET (IMPORTANT)

Do NOT:

- Build full SOPs yet (You need SOPs in your agency, but lets focus on getting some of your time back, first)
- Overcomplicate tools
- Try to delegate everything
- Spend hours training

👉 **Speed > perfection**

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