

DELEGATION CHECKLIST

Healthcare and clinics

The front desk does too many jobs at once. These are the phone and paperwork tasks a medical virtual assistant can take over, so your in-office team can focus on patients.

Hand over first

TASK	READY
Returning voicemails and missed calls about appointments	NOW
Appointment reminder calls, texts and emails	NOW
Booking and rescheduling in your practice system	SOP
Filling cancellations from a waitlist	SOP
Insurance eligibility and benefits checks before visits	SOP
Recall calls for patients due for follow-up	SOP
Processing intake forms and updating records	SOP
Referral paperwork and prior authorization requests	LATER

Set up before day one

- ☐ A business associate agreement in place
- ☐ A named login with minimum necessary access
- ☐ Cloud phone access to your main number
- ☐ Written scripts for clinical questions

Rules to know

- ♦ HIPAA requires a business associate agreement with outside parties that handle patient information.
- ♦ No official federal "HIPAA certification" exists for people or companies.
- ♦ VAs never give clinical advice or triage symptoms.

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Real estate

Real estate rewards the agent who answers first and follows up longest. A virtual assistant covers the desk while you're in showings and closings.

Hand over first

TASK	READY
Fast first replies to new online leads	SOP
Logging every lead and conversation in the CRM	NOW
Scheduling showings, inspections and appointments	NOW
Contract-to-close deadline tracking	SOP
Collecting documents and signatures	SOP
Listing descriptions and social posts, for your review	SOP
Keep-in-touch messages to past clients	SOP
Nurturing long-term leads by phone	LATER

Set up before day one

- ☐ CRM and transaction software logins
- ☐ Your qualifying questions and lead routing rules
- ☐ Your state's contract forms and broker checklist
- ☐ Calling and texting consent rules in writing

Rules to know

- ♦ Fair Housing Act: describe the property, never the kind of buyer you imagine.
- ♦ Unlicensed assistants stay on admin: no negotiating, showing or price opinions.
- ♦ Telemarketing rules and do-not-call lists apply to calls and texts.

DELEGATION CHECKLIST

E-commerce

Every sale creates work: a question, a shipping update, sometimes a return. These are the store tasks to hand to a virtual assistant first.

Hand over first

TASK	READY
Where-is-my-order replies and shipping updates	NOW
Common product questions with approved answers	NOW
Refunds and exchanges within a set limit	SOP
Adding products, variants and prices	SOP
Inventory count updates	SOP
Daily marketplace account health checks	SOP
Responding to public reviews	SOP
Listing optimization on best sellers	LATER

Set up before day one

- ☐ A staff account, never your owner login
- ☐ Refund and exchange policy in writing
- ☐ Your top ten customer questions and answers
- ☐ An escalation rule for angry or VIP customers

Rules to know

- ♦ Never ask anyone to write, buy or hide reviews. The FTC bans it and marketplaces suspend accounts for it.
- ♦ Request reviews only through each platform's approved methods.
- ♦ Keep payment details hidden from staff accounts.

DELEGATION CHECKLIST

Agencies, coaches and SaaS

In service and software businesses, every client touches the founder too often. Hand over the machinery around delivery first.

Hand over first

TASK	READY
Scheduling client calls and coaching sessions	NOW
Client onboarding checklists and access requests	SOP
Keeping project boards current and chasing overdue tasks	NOW
Weekly client reports from templates	SOP
Invoices, renewals and payment follow-up	SOP
Tier-one support tickets and how-to questions	SOP
Course platform and community admin	SOP
Turning your processes into written SOPs	LATER

Set up before day one

- ☐ Named accounts in your project and client tools
- ☐ Client credentials in a shared password manager
- ☐ An onboarding checklist, even a rough one
- ☐ Clear lines on what goes to the founder

Rules to know

- ♦ Check client contracts for rules on subcontractors.
- ♦ Use least-privilege access to client accounts.
- ♦ Follow your privacy commitments to your own customers.

NEXT STEP

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snovaph.com/book