FREE VA Workflow & SOP Starter

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FREE RESOURCE

HOW TO USE: Duplicate this template for each client/project. Complete every field. Use N/A where not applicable.

SECURITY: Record only approved access LOCATION/OWNER. Never place passwords, MFA codes, security answers or private keys here.

1. Workflow Basics

Workflow Name

What outcome should this workflow produce?

What triggers it?

How often does it happen?

Who normally performs it?

2. Inputs & Steps

What information/files are needed?

Step 1

Step 2

Step 3

Step 4

Step 5

3. Completion & Quality

What does 'done correctly' look like?

What common mistake should the VA avoid?

When should the VA escalate?

4. Next Step Reflection

What would you still need to document before handing this workflow to a VA?

LOVED THIS FREE STARTER?

Upgrade to the full VA Workflow & SOP Generator (USD $45) — 7 sections, decision points, exception handling, QA & maintenance. Plus get the Task Handover Generator for complete delegation.
https://justbeconsulting.co.za/shop/va-workflow-sop-generator