A PRACTICAL GUIDE

The Virtual Assistant's Intake and Boundaries Guide

Set clear expectations and protect your time from day one

Made by the Braxis machine

braxisai.com

ABOUT THIS GUIDE

What this is

This guide is for new virtual assistants.

It is a practical method, not a promise of a result. It contains no invented statistics, no fake customers, and no guarantees. The words were drafted with AI assistance.

Use the checklist at the end on a real piece of work this week.

A PRACTICAL GUIDE

Define Your Core Services Upfront

Start by listing the exact services you offer. Avoid vague terms like 'admin support' or 'general assistance.' Instead, specify tasks such as email management, calendar scheduling, data entry, or social media posting. Use clear, concise language to describe each service. For example, instead of 'I handle emails,' write 'I process and respond to client emails within 24 hours, filtering spam and prioritizing urgent messages.' This clarity helps clients understand what to expect and reduces scope creep. Share this list with every new client during intake. It serves as a reference point for discussions and ensures alignment from the start.

A PRACTICAL GUIDE

Set Working Hours and Availability

Establish fixed working hours and communicate them clearly. For example, you might work 9 AM to 5 PM EST, Monday through Friday, with a 30-minute lunch break. Specify how you handle requests outside these hours—whether you respond within a set timeframe (e.g., within 24 hours) or direct clients to a specific communication channel for urgent matters. Use tools like Calendly to block off your availability and automatically schedule appointments. This structure helps you maintain a healthy work-life balance and sets realistic expectations for clients. Always confirm these hours during the intake process and include them in your contract or agreement.

A PRACTICAL GUIDE

Establish Communication Boundaries

Define how and when you communicate with clients to avoid burnout and maintain professionalism. For instance, you might specify that you respond to emails and messages within 24 hours during business hours. Avoid using personal phone numbers or social media for client communication unless necessary. If you use messaging apps like Slack or WhatsApp, set expectations for response times and availability. Clearly communicate these boundaries during intake and include them in your contract. Encourage clients to use a dedicated email address or project management tool for all communications. This keeps work separate from personal life and ensures timely, organized interactions.

A PRACTICAL GUIDE

Create a Clear Intake Process

Develop a step-by-step intake process to onboard clients efficiently. Start with a simple questionnaire covering details like their business needs, preferred communication methods, and deadlines. Use a tool like Google Forms or Typeform to collect this information digitally. Follow up with a contract or agreement outlining services, rates, payment terms, and boundaries. Schedule a short call or video meeting to discuss expectations and address any questions. This process ensures you gather all necessary information upfront, reducing misunderstandings and saving time later. Keep the intake process consistent for all clients to maintain professionalism and efficiency.

A PRACTICAL GUIDE

Handle Scope Creep Proactively

Scope creep happens when clients request additional work outside the agreed-upon scope. To prevent this, always revisit the original agreement during intake and remind clients of the services included in their package. If a new request arises, assess whether it falls within the agreed scope. If not, discuss it openly with the client, explaining how it might impact your workload, timeline, or fees. Offer solutions like adding it as an extra service or adjusting the project timeline. Document any changes in writing to avoid confusion. Proactively managing scope creep protects your time and ensures you deliver on what you promised.

USE THIS

Checklist

☐ List your core services in clear, specific terms and share them with every new client.
☐ Define and communicate your fixed working hours and response times for client requests.
☐ Set boundaries for communication channels and response times, and include them in your contract.
☐ Create a step-by-step intake process using tools like Google Forms or Calendly to gather client information efficiently.
☐ Discuss scope creep openly with clients and document any changes to services or timelines in writing.

Where this came from

This guide is a digital product from Braxis AI. The machine wrote it with AI assistance. It contains no invented statistics, no fake customers, and no guarantees. The PDF is delivered immediately after checkout. If something is wrong, email braxisai@gmail.com and it will be fixed.

braxisai.com