The Reliable Operator Kit

Interview Scripts, Scorecards, and Trial Tasks for Hiring Your Next VA

Purpose: Use this kit to run consistent interviews, compare candidates objectively, and launch a VA with clean visibility and security from Day 1.

Inside this 5-page kit
1) Pre-interview checklist and role lane definition
2) Interactive scorecard (print-ready) for each candidate
3) Role-specific paid trial templates (admin/inbox, marketing, research)
4) Visibility Stack setup guide (Day 1 checklist + Action Log)
5) Contractor Legal Quick-Pack (W-8BEN/W-9, NDA, contractor agreement)

Cover image placeholder

Drop in an infographic, screenshot, or diagram here.

Tip: use a simple diagram like “8 Pillars of a Reliable VA” or a clean hiring workflow graphic.

1) Pre-interview Checklist

Arrive prepared. A disorganized interview produces weak signals and attracts the wrong candidates.

Before the call, confirm:

[ ] Define the role lane and top 3 outcomes for the first 30 days.

[ ] Prepare one real SOP (even a rough draft) to discuss during the call.

[ ] Create a temporary folder or guest access for the paid trial (no full-drive access).

[ ] Decide your overlap window and response standard (example: Slack within 60 minutes).

[ ] Pick your Visibility Stack tools (task board, cadence, optional time tracking, action log).

[ ] Prepare 2 trial tasks and clear pass criteria (speed + accuracy + communication).

[ ] Confirm security rules (2FA, password manager, least-privilege access, offboarding).

Role lane fill-in

This VA's primary objective is to ________________________________

So that I can focus on ____

Role lane: Admin | Inbox | Customer Support | Marketing Ops | Research | Bookkeeping Support | Project Coordination

Image placeholder: Role lane diagram

Drop in an infographic, screenshot, or diagram here.

2) Interactive Scorecard

Use this rating system to compare candidates objectively. Score each pillar from 1 to 5 and add short notes.

Candidate: ____________________	**Date:** ____________	**Interviewer:** ____________________
Role lane: ____________________	**Time zone:** ____________	**Overlap agreed:** ____________________

Pillar	Score (1-5)	Notes
Workflow fit Tools + outputs match your SOPs		
Availability Overlap hours + response standard		
Communication Clarifies early, confirms in writing		
Resourcefulness Improves processes with alignment		
Ownership Follow-up system, no dropped balls		
Workflow execution Checklists, QA, action log habit		
Prioritization Manages trade-offs, stays calm		
Security & compliance 2FA, password manager, least-privilege, paperwork		

Decision notes: Strengths ____________________ Risks ____________________ Next step ____________________

Image placeholder: Candidate comparison chart
Drop in an infographic, screenshot, or diagram here.

3) Paid Trial Templates

Validate speed, accuracy, and communication with a short paid trial. Keep the timebox tight and the rules clear.

Admin / Inbox Trial	
Task	Categorize 20 emails into Urgent, Wait, and Archive using 3 rules you provide.
Inputs	Inbox export or screenshots + your 3 rules (example: client messages always Urgent; invoices Wait; newsletters Archive).
Output	A table with: Subject, Category, Reason, Suggested next action, Due date.
Timebox	60 minutes
Pass criteria	Asks clarifying questions early, applies rules consistently, flags edge cases, and formats the table cleanly.

Marketing Ops Trial	
Task	Turn a 10-minute Loom video into a 3-step SOP with a headline and QA checklist.
Inputs	Loom link + your destination (Google Doc or Notion).
Output	SOP: Title, Purpose, Steps 1-3, QA checklist, Definition of done.
Timebox	90 minutes
Pass criteria	Writes clear steps in plain language, captures key decisions, and produces a checklist someone else can follow.

Research Trial	
Task	Find 10 CEOs in a chosen industry and collect their LinkedIn profiles and best contact emails.
Inputs	Industry + geography + your preferred format (Google Sheet).
Output	Sheet with: Name, Company, Title, LinkedIn URL, Email, Source, Confidence rating.
Timebox	90 minutes
Pass criteria	Uses reliable sources, documents where emails came from, avoids guessing, and communicates uncertainty clearly.

Image placeholder: Trial task workflow

Drop in an infographic, screenshot, or diagram here.

4) Visibility Stack Setup Guide (Day 1)

Set up visibility on Day 1 so you never need to chase updates. Keep the system simple and consistent.

Day 1 checklist:

[ ] Create a shared task board (Asana/ClickUp/Trello) and add the first 10 tasks with due dates.

[ ] Create an Action Log (Google Doc) and share it with edit access.

[ ] Schedule the weekly cadence: 25-minute planning call + 5-minute daily async update.

[ ] Confirm the response standard (example: Slack within 60 minutes during overlap hours).

[ ] Agree on time tracking only if you pay hourly or the scope stays unclear.

[ ] Review your security rules and confirm offboarding steps (revoke access immediately on exit).

Action Log template (copy into a Google Doc)

An action log is a shared document that tracks decisions, blockers, and next steps so nothing gets lost between messages.

Date	Decision	Blocker	Next step	Owner	Due

Security protocol for sharing credentials

Invite the VA to your password manager as a team member (1Password/LastPass). Share only the vault items they need. Never share a master password by email or chat.

5) Contractor Legal Quick-Pack

W-8BEN vs. W-9: Use a W-9 for US-based contractors. Use a W-8BEN for international contractors who are not US persons.

Independent Contractor Agreement: Define scope, payment terms, confidentiality, IP ownership, and termination. Sign before access begins.

NDA in plain English: The VA agrees not to share your private information, client data, passwords, pricing, SOPs, or internal documents. They use your data only to do the job and return or delete it when you end the contract.

Image placeholder: Security and onboarding flow

Drop in an infographic, screenshot, or diagram here.