Virtual Assistant Tools Starter Pack

A simple guide to the tools you need and where to learn them

Created for women starting their VA journey with confidence.

📅 Scheduling & Appointments

Calendly

Purpose: Lets clients book meetings without back-and-forth emails
Used for: Discovery calls, client check-ins, meetings
Learn here:

- Calendly Help Center
- YouTube: "Calendly tutorial for beginners"

Google Calendar

Purpose: Manages schedules and reminders
Used for: Time blocking, deadlines, appointments
Learn here:

- Google Workspace Learning Center
- YouTube tutorials

💬 Communication Tools

Gmail / Outlook

Purpose: Professional email communication

Used for: Client emails and file sharing

Learn here:

- Google Workspace Learning Center
- Microsoft Learn
- YouTube

Zoom / Google Meet

Purpose: Video calls and screen sharing

Used for: Client meetings and training

Learn here:

- Zoom Support Center
- Google Meet Help
- YouTube

Slack

Purpose: Team messaging

Used for: Daily client updates and collaboration

Learn here:

- Slack Help Center
- YouTube: "Slack for beginners"

📁 File Storage & Organization

Google Drive

Purpose: Store and share files securely

Used for: Client folders and documents

Learn here:

- Google Drive Help Center
- YouTube

Dropbox

Purpose: Backup and file sharing

Used for: Client files

Learn here:

- Dropbox Help Center
- YouTube

✅ Task & Project Management

Trello

Purpose: Visual task boards

Used for: Client tasks and workflows

Learn here:

- Trello Guide
- YouTube

Asana

Purpose: Project tracking and deadlines
Used for: Multi-step projects
Learn here:

- Asana Academy (free)
- YouTube

🎨 Design & Content

Canva

Purpose: Create graphics and documents
Used for: Social media, flyers, presentations
Learn here:

- Canva Design School
- YouTube

Loom

Purpose: Record video messages
Used for: Walkthroughs and instructions
Learn here:

- Loom Help Center
- YouTube

📧 Marketing & CRM

Mailchimp / ConvertKit

Purpose: Email marketing
Used for: Newsletters and campaigns
Learn here:

- Mailchimp Academy
- ConvertKit Help Center
- YouTube

HubSpot CRM / Zoho CRM

Purpose: Manage contacts and leads
Used for: Client records
Learn here:

- HubSpot Academy
- Zoho CRM tutorials
- YouTube

💰 Finance & Payments

QuickBooks / Wave

Purpose: Track income and expenses
Used for: Bookkeeping
Learn here:

- QuickBooks Training
- Wave Help Center
- YouTube

PayPal / Stripe

Purpose: Receive payments

Used for: Invoices and subscriptions

Learn here:

- PayPal Help Center / Stripe Guides

🔐 Security

LastPass / 1Password

Purpose: Secure password storage

Used for: Client logins

Learn here:

- LastPass Help Center
- 1Password Learning Center
- YouTube

🧠 All-in-One Workspace

Notion

Purpose: Notes, systems, and templates

Used for: SOPs and workflows

Learn here:

- Notion Guides
- YouTube

🧩 How These Tools Work Together

Most successful VAs don't use 20 tools.They use **a system** that works like this:

Client Communication:
Email + Zoom + Slack

Project Tracking:
Trello or Asana

Scheduling:
Calendly + Google Calendar

Design & Content:
Canva + Google Drive

Marketing & CRM:
Mailchimp + HubSpot

Finance:
QuickBooks or Wave

Systems keep you organized.
Clients love to be organized.

🎓 Best Places to Learn

- YouTube (search: tool name + beginner tutorial)
- Official Help Centers
- HubSpot Academy
- Google Digital Garage
- Udemy
- Skillshare
- Coursera
- Community Schools

💡 Starter Tip

You don't need to learn everything at once.
 Start with:

- Email
- Google Drive
- Calendly
- Trello or Asana
- Zoom

Add tools as your clients grow.

Systems create confidence. Confidence attracts clients.