

How-To Interview a Virtual Assistant

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This is a lengthy article, and should actually be a bookmarked post to refer back to it, so I will offer a TL;DR type summary:

I am presenting you a series of questions coving a wide range of topics that you should not only consider when deciding what type of Virtual Assistant you want to hire, but that will help you pick out those for the short list of consideration when the actual interviewing starts. Because your job is not being the assistant, I then give you some firsthand knowledge of how the answers might be presented and what kind of trigger points you need to look for and consider in your decision process.

Make sure you bookmark this article to return to when it is time to make that leap into hiring a Virtual Assistant.

Virtual Assistants can be a huge boost and treasure trove for startups or busy professionals alike, but of course there are always potential problems with long distance/remote relationships. Hopefully, some of that can be alleviated by what questions you ask a potential Virtual Assistant hire. In an attempt to maximize the good and minimize the negative a good selection of these questions are addressed below.

If you have come to the decision that you need a Virtual Assistant to effectively improve your productivity and reduce your stress levels – giving you a better balance between life and work then your next question is very possibly this one. It is important. There are some things that are different about hiring a Virtual Assistant than hiring an in house assistant. There are of course potential benefits and potential detractors. Your job in the hiring process is to get someone that maximizes the beneficial improvements and as much as possible “eliminates” the negative issues. No one will be 100% beneficial – that’s impossible to find even when hiring an in house employee, but getting as close as you can to YOUR 100% beneficial is your goal.

Before you begin asking questions, it is really important to know what answers you are looking for. Therefore, take some time and really think about what you would like these answers to be. Here are some important questions to ask your potential new hire(s) while interviewing:

Who Are You Questions:

1. How did you come to this career?
2. What do you enjoy doing in your free time?

What Is Your Work Experience Questions:

3. What would you consider your core skills and services?
 - a. What type of work are you the most qualified for?
4. Which tasks are outside your scope?
 - a. What type of work are you the most interesting in learning?
 - b. What are you NOT good at/not interested in?
 - c. What do you prefer not to get as tasks?
5. How do you prefer to communicate?

6. Have you hired and fired other employees?
 - a. What is your worst experience firing someone?
7. How have you handled a situation where someone on your team is under-performing, but not so much that they needed to be fired?
8. If you accept a task that you find you can't complete on your own, what would you do?
9. What would you do if you thought you understood an assignment but later realized you didn't?
10. If you have a task list that you realized won't be completed by the deadlines, what do you do?
 - a. What is the first thing you would do if your computer crashes or your internet goes down and you are on an urgent deadline?
11. What would you do if you had an urgent question, but couldn't find anyone available qualified to answer?
 - a. What if you need important information from a team member in a different time zone and they won't be available for the next 4 hours?
12. Have you ever spoke up and contradicted a boss or supervisor?
 - a. What happened?
13. What is a professional setting you have worked in where people had different communication styles?
 - a. How did you work with this?
 - b. What communication problems have you noticed in previous work situations?
 - c. How do you manage relationships with difficult team members?

What Is Your Work Philosophy Questions:

14. Do you have experience working as part of a remote/long distance team?
 - a. What are the biggest challenges?
 - b. What benefits does this provide?
15. What do you do when a client has trouble articulating their needs?
16. How do you stay motivated during monotonous/repetitive tasks?
17. If your inbox is flooded with messages how do you prioritize which ones to respond to first?
 - a. How do you prioritize the rest of the list?
18. What is an example of a time you proactively addresses a client's need?
19. How quickly do you respond to emails?
 - a. Phone Calls?
 - b. Texts?
20. What time zone are you in and what hours are you available?
 - a. What are your schedule restrictions?
 - b. What is your preferred schedule?
21. How do you juggle personal matters (phone calls, distractions, etc.) with getting work done from home?
22. Do you have any experience with ...?

What Tools Do You Use For Work Questions:

23. How do you ensure accuracy in routine tasks such as processing expenses and preparing reports?
24. What are your favorite tools you use in work?

- a. What other tools do you use?
 - b. What calendar management tools have you used?
 - c. What is your familiarity with online group communication tools?
25. Describe the steps you'd take to plan a meeting for 10 people?
26. How do you make sure you find the best deal when booking travel accommodations?
27. Do you have any experience with ...?

References Questions:

28. Who are your 3 most recent employers?
- a. What tasks did you do for them?
 - b. How will they rate your work on those tasks when I ask them?

That's probably brought your mind to the point of overload, thinking that is so many questions but remember this person is going to potentially have their finger in many pots of your business and maybe even your personal life and you want to really make sure you have the right person on your team. When you thought about the answers for yourself, what kinds of answers did you come up with? Short one word answers or more in depth and elaborate ones.

Honestly, there are no answers that are extremely wrong – you want the interviewee to be honest with you, but you need to think about how their answers will affect your business and/or your life, fit in with your team and business culture, and mesh with your needs. I am going to help you think of these potential boons and pitfalls by going through each question one by one, but remember, the final decision needs to be made by you based on your needs, your goals, and the fit with your company and needs:

Who Are You Questions:

- *How did you come to this career?*

Make sure the VA is comfortable talking about their process/life decisions and comfortable with open ended questions. Look at what they choose to share, stress, and hold back on. It is a good icebreaker, but can be very telling. Make note of any questions this brings up for you and address them next or at an appropriate time in the interview.

You need to be wary of people that are doing this for an “easy” job. They are probably the type who took underwater basket weaving for the easy “A” in school to get out of more complex though provoking classes. No joke, I had someone approach me wanting me to show them how to be a Virtual Assistant so they could have an easy job. Being a Virtual Assistant takes focus, dedication, work, and knowledge. It is not something that someone should just fall into.

To give an example, I became a Virtual Assistant through a long transition of jobs that lead me up to this process. This same thread of transition opened the opportunity and doors for me to run my own Virtual Assisting business and bring on my own team of Virtual Assistants. I started out as an office manager in an insurance agency, moved to call center for insurance, moved back to office manager and sales for another insurance agent. All the while I was running my own art studio on the side, and then my husband at the time and I took on 3 special needs foster children. I had to become a stay at home mom due to their schedule and needs so I left the day to day work force and focused on my artwork and took

classes to expand my knowledge base for things like Microsoft Office, and other useful programs and things to run a business etc. I did this for years and then when my ex-husband chose to get a divorce, and therefore the foster kids were removed, I was left a bit in the lurch. I had no job, and so started looking for something I could handle, but had no transportation as he took the vehicle, so I started working from home for a survey company. I moved into team management with the company, still making sure I was gaining education, and eventually took a side hustle doing medical transcription and editing. When my living situation changed causing the noise levels to not be conducive to doing the survey work (they required absolute silence on our end so it would appear we were in an office) I resigned and moved on to doing Virtual Assisting work through a company – Zirtual. I got a few years under my belt and earned a ton more experience and then when they shut their doors retroactively, I reached out to the clients who were also left in the lurch and began running my own business. I have grown to this point where I am today.

So, you can see there was steady transitions, but I stayed in jobs, I have done work from home, I am proactive about knowing what I can and cannot accomplish for environment, etc. Now what you would need to do is know whether these type of transitions and skills are something you need and if this brought any questions up for you.

- *What do you enjoy doing in your free time?*

Get to know a little about your prospect. This isn't set to eliminate anyone (unless they tell you they like to go on benders and/or get high, etc. which is going to show you they don't make good decisions), but it will let you know what kind of mindset they have. Do they volunteer at a shelter, church, etc.? Do they spend time with their family? Do they run a business? Do they play in a band? Do they race funny cars at the track? Do they perform as a clown at kids' birthday parties? Whatever it is, let them tell you their story.

And don't be afraid of the ones who tell you they run a side business. These people are driven, dedicated types and know what kind of work is necessary to get the job done. It doesn't automatically mean they aren't going to have time for you and what you need. You will hopefully cull those individuals out with later questions.

What Is Your Work Experience Questions:

- *What would you consider your core skills and services?*
 - *What type of work are you the most qualified for?*
- *Which tasks are outside your scope?*
 - *What type of work are you the most interesting in learning?*
 - *What are you NOT good at/not interested in?*
 - *What do you prefer not to get as tasks?*

All of these are well interconnected, so I will address them in whole while addressing them in parts.

There is no right or wrong answer, just what's right or wrong for your business and your needs in a Virtual Assistant. Virtual Assistants can be as wide ranging as there are numbers. That's good for you because you can find someone who fits in as perfectly as humanly possible. On our team we have a range of support and use that to best serve our clients. We have member(s) who are excellent at the office tasks (Word, Excel, email, communication, data entry, and etc. type work), member(s) who are

excellent at the “planning” type tasks (corporate events, parties, etc.), and members who are set for the “off hours” type tasks (shopping, transcription, etc.). Using this setup, we pair clients to who they need the majority type work for, and anytime that client needs something the Virtual Assistant can’t handle (either for time or knowledge) we have a built in backup system to help each other out and keep the client on schedule as much as possible.

When a prospect is answering these questions though, make sure they don’t know what it is you are looking for yet. You are looking for whether they naturally say they do the things you need, and that these important points are not within the last two segments.

Also, if you don’t need a lot of tasks to be done in the most urgent of time frame and are willing for your Assistant to learn, don’t negate their willingness to do so. If they don’t say they aren’t willing/interested, at this point make a mental note to approach the idea they can learn what you need while you accept there will be a learning curve for a short time.

- *How do you prefer to communicate?*

Everyone has their preferences. It’s only natural. You just want to know if they are open to the way you prefer to communicate.

As an example, I prefer email communication personally. It gives me a better chance to prioritize and make sure everything gets done on time and nothing gets overlooked accidentally. I have a long standing client who does send some stuff by email, but he drives a lot, and doing email is not easy much of the time while he can talk to me on the phone with his hands free set. He has me reading emails, writing emails, handling mundane tasks for him so that when he gets in front of his keyboard he has a much lighter load to deal with. I can accept doing this type of work and we make it successful for him, but it isn’t my “**preference**”. Remember, the same can be true of your prospect, but if you prefer email, and they prefer email, it is just one more tick in the positive column when making the decision.

- *Have you hired and fired other employees?*
 - *What is your worst experience firing someone?*
- *How have you handled a situation where someone on your team is under-performing, but not so much that they needed to be fired?*

This is also a “package” set of questions. Not everyone has had experience with hiring and firing. It brings a real different perspective to their work ethic, as well as their expectations on themselves and of you. They are predictably more proactive, productive, harder working, and willing to do whatever it takes to get the job done in quality while feeling less entitled, less of the “special snowflake” issue. Also having management experience can be a great asset, even if they aren’t immediately managing a team.

Individuals with this experience can help in so many ways and then if something happens and you need them to take the reins either temporarily or longer term, you know they have some background to get that done. Heaven forbid you or a family member becomes ill, or you have an emergency (travel delay, urgent need that requires your 100% attention, etc.) You know you have a team member ready and experienced to step up to the plate and handle it. It can be a real peace of mind for you whether you need it right now or not.

You of course would want them to have a core knowledge of your company, culture, practices, etc. before you blindly released the reins to them. You have to learn to walk before you can gallop.

- *If you accept a task that you find you can't complete on your own, what would you do?*
- *What would you do if you thought you understood an assignment but later realized you didn't?*
- *If you have a task list that you realized won't be completed by the deadlines, what do you do?*
 - *What is the first thing you would do if your computer crashes or your internet goes down and you are on an urgent deadline?*
- *What would you do if you had an urgent question, but couldn't find anyone available qualified to answer?*
 - *What if you need important information from a team member in a different time zone and they won't be available for the next 4 hours?*

Another set of package information, but very critical for each answer. Now you are getting into the nitty gritty of their practices and work ethic.

You need someone who has experience (embarrassing as it is for the Virtual Assistant) and is willing to admit it. If they are giving you answers of "I guess I would..." or if they are having to really think about it like they have no experience, you could be stepping into a problem. This is untested waters and you may not get as good an experience as you hoped. Even if they give a good answer, noting that they seem to be inexperienced could mean that in the heat and stress of the moment they wouldn't really behave the way they answered.

You of course are looking for them to say they asked for clarification, advised you as soon as possible of the time issue, etc., but if they haven't been down that path, they could be telling you what you want to hear. Remember, people are taught to make everything into a positive in an interview, so they could be just answering what feels like the best answer, but everyone knows in the stress of the moment, that isn't necessarily what happens. The best of intentions often go astray when faced with the weight of the moment.

Potential VA's are likely to go into this answer thinking that you want to hear they would get their internet back up, go to a café, etc. but really, the best answer you can hear is "I would contact you immediately and tell you what steps I am taking to solve it" or something to that effect. Things happen, technology fails, etc. but you want someone who communicates, and problem solves. That's the most important thing to consider.

Also, do you want someone who makes decisions and asks for forgiveness later, or do you want someone who is always asking permission. There is no right or wrong, just different, and you need to balance it with who and what your style is. For example, personally (unless I know the client is different) I would do my best (for the different time zone/urgent task question) to take the past information and from contextual clues produce the work needed as it is (in my opinion) easier to edit than to create. I would then flag the information for a double verification to make sure there was no issues. However, if my client had instructed me either that this was different from the norm, or that there was some reason to believe the context of the past would not translate to this current project, I would not do that. I would contact the needed person (probably by email unless the circumstance warranted something different) and copy my client so they knew the request was in process and continue working on the remainder of the task possible until I had an answer. Your situation and needs may reveal in that type of

answer, but may not as well. You might prefer to have a VA that waits for your decision, or that calls no matter what the time or who they are contacting. This is where your knowledge of what you're needing and wanting becomes crucial.

- *Have you ever spoke up and contradicted a boss or supervisor?*
 - *What happened?*
- *What is a professional setting you have worked in where people had different communication styles?*
 - *How did you work with this?*
 - *What communication problems have you noticed in previous work situations?*
 - *How do you manage relationships with difficult team members?*

This is all about personal preference and the culture of your work/business environment, but you need to decide what you are looking for to be able to weed out those who aren't well suited. What you are likely hunting for is someone who knows how to deal with different communication styles and issues and how to work around/through them.

Poor communication or complete lack thereof is at the root of so many work place issues be they remotely located or right in the office. You want to make sure your team member is professional, experienced, and a problem solver so that these don't get in the way and bog the process down. Ignoring them can't be a solution, but finding a solution is as individual as your company is.

What Is Your Work Philosophy Questions:

- *Do you have experience working as part of a remote/long distance team?*
 - *What are the biggest challenges?*
 - *What benefits does this provide?*
- *What do you do when a client has trouble articulating their needs?*
- *How do you stay motivated during monotonous/repetitive tasks?*
- *If your inbox is flooded with messages how do you prioritize which ones to respond to first?*
 - *How do you prioritize the rest of the list?*
- *What is an example of a time you proactively addresses a client's need?*
- *How quickly do you respond to emails?*
 - *Phone Calls?*
 - *Texts?*

All of these look widely ranging but it comes down to one core element – discipline. Working remotely takes a special type of individual, as there isn't the constant face to face that many people instinctively use to keep themselves going (for good or bad). What you need to determine is how the prospect overcomes that hurdle and uses it to their benefit (or if it is a detriment to them by the flip side of the coin.)

Look for realistic, reliably replicable answers. For example, no one can ALWAYS reply to emails immediately. However, an answer of "During business hours as immediately as possible but usually no more than 1 hour and always within 24 hours Monday through Friday" or something similar is a realistic, useable answer. Think of it this way – if you have given the VA a task and it takes concentration, would you want them constantly distracted by answering a flood of emails coming in, or would you rather they

give the task they are on the attention it deserves and systematically check emails and respond appropriately to them.

As for being proactive, this is important to varying degrees. I have one client that I constantly keep an eye on whether he is repeating work he has done (he is supremely scatterbrained) or setting himself up for an embarrassment by sending communications drafted and half finished, etc. He's a client that is full of monotonous tasks, but not much opportunity day to day to "upsell". However, knowing he likes to spend special attention to his clients at least once a year I have devised a system to provide him a travel breakdown so he can pick where and when to go and know he won't miss anyone along the way in his service area radius. Also, when he does these, I make note of potential contacts and places that he can go to try to sell his services, and have been doing this for him constantly ever since. He never has to ask for the information, he just knows he can go to a set spot and pull everything up, and take off on his trip.

Another client does a lot of business travel, and through providing service to her I have learned she really loves theater and outdoor activities. When I plan a trip for her and find out her schedule, I try to find her a show (Broadway style) or something similar to go to while she is away. If there is no opportunities, I give her some suggestions of outdoor events, concerts, etc. that she might want to do just to take in the local ambiance. I also find her gems of restaurants to visit because she is a bit of a "foodie".

All these things boost the value I provide to my clients without adding to the cost. I'm already looking into driving directions and can see where the one client is already providing services, so noting additional locations is nothing but a little typing, but it saves him potentially hours of time. I'm already looking at hotels, restaurants, venues, etc. for the second client, but giving her the entertainment and food options saves her loads of time and allows her to potentially do more since she isn't spending time searching that she could be spending doing them.

The other questions are very personally telling, and it is important you have an idea how you would like them to answer so you can find someone who is in line or similar enough to make you happy.

- What time zone are you in and what hours are you available?
 - What are your schedule restrictions?
 - What is your preferred schedule?
- How do you juggle personal matters (phone calls, distractions, etc.) with getting work done from home?

This is where you determine whether the prospect has time for what you need. Remember, you need to find someone who can produce your results on your schedule reliably, not someone who has no limitations etc. There is a reason you are hiring someone to work remotely, and there is a reason they want to work remotely. Finding that good gel between those reasons is what is important.

If you are looking to have work done for you while you "sleep" then find someone available in that window of time. If you are looking for someone to work during your business hours, then that's an important factor to consider with availability.

Personally I work from about 2 pm British time (8 am CST) until 6 pm Pacific (8 pm CST). I am able to work on my British client's work while he's asleep (that's what he needs) so it's ready when he gets up. He sends me tasks through the day that he doesn't have time to do and I take care of them while he is

off and he comes back doubly productive the next day.) A large portion of my clients are in California, so I work within the window they need (which most request during business hours). I am able to work for world-wide clients as long as those needs fit into the window described. Some people want something different, and for those people, I personally am not a good fit. I need time for my family, sleep, eating, etc. as much as they do. However, I have other team members who want to work from 7 pm CST until 1 am CST because they are night owls and that is when they have the time and the lack of distractions to do quality work. If someone wanted the service of our business, but needed those hours, they would be referred to that team member.

- *Do you have any experience with ...?*

Now is the time to ask pointed questions about specific situational needs you have (not specific tools, etc.) If you need someone who has experience dealing with anxiety perplexed dyslexic law students who can't take tests or read emails and are attending Yale and suing another University for not accommodating their disability (yes, I have had a client matching that description) then this is the time to find out how they will fit with YOU on a personal level.

Understand when asking this question, as many people as there are, you are not likely to find someone who has extended experience with people exactly like you. However, you will likely find that someone has experience with disabilities, or even anxiety disorders, dyslexia, etc. Get as much information as you can so you can find the most comfortable best situational match you can considering all other questions.

What Tools Do You Use For Work Questions:

- *How do you ensure accuracy in routine tasks such as processing expenses and preparing reports?*
- *What are your favorite tools you use in work?*
 - *What other tools do you use?*
 - *What calendar management tools have you used?*
 - *What is your familiarity with online group communication tools?*

What you are looking for here is not so much whether they have a lot of wide ranging experience (although that can be helpful if your business environment has it as a cultural need) but rather that they have a base knowledge, can recall specifics on the spot, and have thought about it enough to formulate any opinions, or just go through the motions.

You are looking for people who are detail oriented, someone who has an openness to new techniques when needed, and as mentioned before, a problem solver. When answering the accuracy question especially these are key points you should be hearing. Do they have a system? Do they even proof their work or do they sound like they are making it up ("I guess I would ..." type statements again). Look for someone who has experience, knowledge, and expertise – that (even if not the way you would do it) is much more preferable over someone who finishes with "that's good enough."

Tools really are quite similar, and though there is a learning curve, they can be relatively quickly learned across the board. When discussing the tools, you are really looking for whether they have experience, and if any of them naturally line up with your tools in use.

- *Describe the steps you'd take to plan a meeting for 10 people?*
- *How do you make sure you find the best deal when booking travel accommodations?*

These are more situational questions. They may not pertain to your needs. While there is always a chance you will want them to make travel arrangements, etc. and everyone wants the best deal, these can be asked or overlooked based on your circumstance.

You can ask the questions to get a better sense of how they work with more abstract concepts (such as managing such a large information pool (travel accommodations) and big picture concepts (planning meetings) however, if these are not issues you will need on a semi-regular basis, unless the answers are completely against the grain you want to have in your VA, they really should not be major detractors. These are fine tuning type points, and really only meant to give you deeper insight into work processes and familiarity with productive needs.

For example planning a meeting with 10 people, you are looking for the procedural steps. Gather the itinerary, schedule the meeting, etc. If you want them to go further you need see them allow for discussion time, and with 10 people that is more than with 2 or 3. You need to allow for breaks (depending on how long the meeting is set to run) because 10 people's bio needs will be on different schedules. You need to allow for questions, dissention, and talking points. You also need to allow for overrun due to people talking out of turn, etc. in case the meeting gets "out of control". These kinds of things are big picture scope. Then, even deeper (if you want them to describe that) you need to know more about how the meeting itinerary will be planned. That is more specific and I won't go into it here, but this can be instructed to and learned by your VA. However, asking question(s) like these you can see if they think along the same lines as you and your business culture.

- *Do you have any experience with ...?*

Now is the time that you ask about whether they have experience with specific tools etc. Remember these can be learned, but when choosing between two different candidates and if this is the only difference, then the one with the experience is going to be the faster to onboard.

References Questions:

- *Who are your 3 most recent employers?*
 - *What tasks did you do for them?*
 - *How will they rate your work on those tasks when I ask them?*

References are very important to a VA, and some may not be comfortable giving out private information for their clients. This should be respected, but they should be able to provide some sort of verification of past history of work – be it prior jobs (not VA jobs) or whatever fits.

Follow up with these references and ask them questions appropriate for a reference. Get the information you need so you can review everything as a whole.

This has been a long read, but I hope it has been helpful for you not only in knowing what to ask, but how to interpret the potential answers you get. Once you have done this for the potential candidates, your hard work begins. You need to weed out the chaff and get to the short list of people you would be able to work with. Limiting this to 2 at minimum and 5 at maximum is ideal. Next you would want to get some sort of personal interaction (either through a skype call, google hangout, or phone call) to see if you click on an individual level. Once you found your match, make arrangements to begin doing a trial/test and make sure as close as possible these answers were correct and realistic. If they were,

great! If not, then you have a pool of others to fall back to that made the short list. I will be posting more about these processes later.

Interlocked Solutions has room currently for new clients and we are interested in talking to you about your needs. Let us create a specific plan that meets all of your needs, and has room to grow for your potential desires by contacting us today at 972-885-9187.

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Written by Lucy Moore
Owner of Interlocked Solutions