Virtual Assistant SOP Library

Sample pack — John Paulo Amaro, Administrative Virtual Assistant

This pack shows how I document recurring work so it runs the same way every time: a clear trigger, numbered steps, explicit decision rights, a quality check, and a defined completion report. The SOPs are samples written for a fictional client scenario (Maya, a studio owner); names, tools, and times are illustrative. The method — including the document-control headers on every SOP — is the same one I use for real client work.

HOW TO READ THESE SOPS

- **"You may act without asking when" —** the decisions the VA may make independently.
- **"Stop and ask when" —** the situations that need the owner's decision first.
- **"Never" —** the actions that are off-limits even if they seem helpful.

CONTENTS

SOP ID	Title	What it covers
SOP-VA-000	SOP Template	The master template every new SOP starts from
SOP-VA-001	Inbox Triage	Twice-daily inbox processing with labels, drafts, and a summary
SOP-VA-002	Meeting Scheduling	Booking meetings across time zones inside the client's windows
SOP-VA-003	Support Routing	Classifying and routing customer support requests
SOP-VA-004	CRM Update	Updating contact records from verified sources, with an audit note
SOP-VA-005	Content Publishing	Publishing approved posts with link and metadata checks
SOP-VA-006	Document Control & Filing	IDs, naming, versioning, and archiving for controlled documents

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SOP Template

Standard Operating Procedure — master template

SOP ID	SOP-VA-000
Version	1.0
Owner	John Paulo Amaro — Virtual Assistant
Last reviewed	19 November 2026
Status	Template — copy and complete for each new task
Scenario	Sample SOP — written for a fictional client scenario (Maya, a studio owner) to demonstrate method. Names, tools, and times are illustrative.

OVERVIEW

Purpose: [In one sentence, explain why this task is done. Example: “To keep the expense tracker up to date.”]

Trigger & timing: [Say what starts the task and how often it is done. Example: “Every Friday at 3 p.m.” or “When the owner assigns the task.”]

Expected output: [Describe the end result in verifiable terms. Example: “Every new receipt is logged with the date, vendor, amount, and category.”]

PEOPLE

Task owner: [The person who makes business decisions about this task.]

Performed by: [The VA’s name.]

Reviewer: [Optional. Who reviews the work, if anyone — a temporary review period is fine. Example: “Owner, for the first two weeks.”]

Escalation contact: [Who the VA contacts with questions, and where. Example: “Maya, Slack DM.”]

TOOLS AND ACCESS

Tool	Access needed	How to request access
[Name the tool.]	[View, edit, or admin.]	[Who to ask, and how.]

Keep passwords and other credentials out of the SOP. Share access through a password manager or the tool’s own invite system.

BEFORE YOU START

[List what the VA needs first: files, information, approvals, or access.]

STEPS

Write the steps by performing the task once and noting each action, or by recording the task and turning the recording into instructions. Start each step with a verb — open, find, check, add, send. Add a screenshot wherever seeing the screen helps. End with a step that confirms the action worked.

1. [Describe the first action.]

2. [Describe the next action.]

3. [Continue until the task is complete.]

4. [Confirm the result. Example: "Refresh the tracker and check the new rows are saved."]

DECISIONS AND EXCEPTIONS

If this happens	Do this	Who decides
[A situation. Example: "A receipt is unreadable."]	[What the VA does. Example: "Ask the sender for a clearer copy."]	[VA]
[An exception. Example: "A receipt is over $500."]	[Example: "Log it, flag the row, and message the owner."]	[Owner]

You may act without asking when: [The decisions the VA can make independently.]

Stop and ask when: [The situations that need the owner's decision first.]

Never: [The actions the VA must never take, even if they seem helpful.]

QUALITY CHECK

- [Check 1 — specific enough to verify.]
- [Check 2.]
- [A check for a mistake that happens often on this task.]

REPORT COMPLETION

Where: [Where completion is reported. Example: "#finance in Slack."]

What to report: [What to share. Example: "12 receipts added; 2 need review."]

Deadline: [When. Example: "By 5 p.m. every Friday."]

EXAMPLE AND REFERENCES

What good looks like: [Link to a past finished example.]

Visual guide: [Link to a recording or step-by-step guide.]

Mistakes to avoid: [An easy-to-make error on this task, so the VA knows to watch for it.]

UPDATE THIS SOP WHEN

- A tool, policy, or workflow changes
- The assistant encounters a situation the SOP does not cover

Who edits it: Owner, or the assistant with the owner's approval.

SOP: Inbox Triage

Triage Maya's email inbox

SOP ID	SOP-VA-001
Version	1.0
Owner	John Paulo Amaro — Virtual Assistant
Last reviewed	19 November 2026
Status	Sample — approved for portfolio use
Scenario	Sample SOP — written for a fictional client scenario (Maya, a studio owner) to demonstrate method. Names, tools, and times are illustrative.

Trigger: Weekdays at 9:00 and 15:00.

Expected output: No unread messages, every message carries exactly one label, and a summary is posted for Maya.

STEPS

1. Open the inbox and filter to unread messages.

2. Give each message one label: Reply needed, Maya to review, FYI, or Archive.

3. Archive anything on the archive list once it is labeled. The list covers newsletters, automated receipts, and tool notifications.

4. For Reply needed messages that match a saved reply, write a draft from the saved replies document. Leave it in Drafts.

5. Star every "Maya to review" message.

6. Post a summary in Slack: drafts waiting, starred messages, and anything urgent at the top.

DECISIONS AND EXCEPTIONS

If this happens	Do this	Who decides
A client mentions a deadline today	Message Maya in Slack within 30 minutes	VA
You aren't sure which label fits	Use Maya to review	VA
Someone asks for a call	Follow the meeting scheduling SOP (SOP-VA-002)	VA
A message is from a lawyer or the tax office	Star it and flag it in the summary	Maya

You may act without asking when: A message is on the archive list, or a saved reply fits it exactly.

Stop and ask when: A message mentions a payment or a complaint.

Never: Send a reply from Maya's account during the first month. Delete a message.

QUALITY CHECK

- The unread count is zero.
- Every message has exactly one label.
- Every draft is in Drafts, and nothing was sent.

REPORT COMPLETION

Where: #inbox in Slack

What to report: Number of drafts waiting, number of starred messages, urgent items first.

Deadline: By 9:30 and 15:30 daily.

SOP: Meeting Scheduling

Schedule a meeting with Maya

SOP ID	SOP-VA-002
Version	1.0
Owner	John Paulo Amaro — Virtual Assistant
Last reviewed	19 November 2026
Status	Sample — approved for portfolio use
Scenario	Sample SOP — written for a fictional client scenario (Maya, a studio owner) to demonstrate method. Names, tools, and times are illustrative.

Trigger: Someone asks to meet with Maya, by email or Slack.

Expected output: A calendar invite every attendee has accepted, with a video link and a one-line agenda.

Maya's meeting windows: Tuesday to Thursday, 10:00 to 16:00 IST, with 15 minutes between meetings.

STEPS

1. Confirm who is attending, how long the meeting is, and what it is for.

2. Find each attendee's time zone. Check their email signature first, then ask if it is missing.

3. Check Maya's calendar for open slots inside her meeting windows.

4. Offer two slots, written in the attendee's time zone with Maya's in brackets.

5. When they pick one, check the calendar again for conflicts.

6. Send the invite. Title it "Studio x Company: Purpose" and add the video link and agenda.

7. Reply in the thread to confirm the invite is sent.

DECISIONS AND EXCEPTIONS

If this happens	Do this	Who decides
No open slot in the next two weeks	Send Maya the request and the first slot outside her windows	Maya
The attendee asks to reschedule a second time	Hand the thread to Maya	Maya
The meeting would fall before 9:00 or after 18:00	Ask Maya first	Maya
An existing client asks for a 30-minute check-in	Book it inside her windows	VA

You may act without asking when: The attendee is an existing client and the meeting fits Maya's windows.

Stop and ask when: The request is from someone new, or it needs more than 60 minutes.

Never: Move or cancel a meeting already on Maya's calendar.

QUALITY CHECK

- The invite shows the right time in both time zones.
- The video link opens.
- Every attendee is on the invite.

REPORT COMPLETION

Where: Reply in the original email or Slack thread.

What to report: The confirmed date and time.

Deadline: Within one business day of the request.

SOP: Support Routing

Route a customer support request

SOP ID	SOP-VA-003
Version	1.0
Owner	John Paulo Amaro — Virtual Assistant
Last reviewed	19 November 2026
Status	Sample — approved for portfolio use
Scenario	Sample SOP — written for a fictional client scenario (Maya, a studio owner) to demonstrate method. Names, tools, and times are illustrative.

Trigger: A new message arrives in the support inbox.

Expected output: The customer has an approved reply, or the request is assigned to the right person with a note they can act on without rereading the thread.

STEPS

1. Read the whole message and pick one type: How-to, Billing, Bug, Refund, or Other.

2. For How-to requests, check the approved help articles list for an answer.

3. If an approved article answers it, draft a reply with the saved response and the article link.

4. Otherwise, assign the request using the routing table below.

5. Add an internal note: who the customer is, what they asked, what you checked, and what they need next.

6. Tag the request with its type and check it shows in the assignee's queue.

ROUTING TABLE

Type	Route to
How-to, not covered by an article	Support Lead
Billing	Maya
Bug	Project Lead for that client
Refund	Maya

DECISIONS AND EXCEPTIONS

If this happens	Do this	Who decides
The message fits two types	Route by the first thing the customer asked	VA
The customer mentions a lawyer or a public review	Assign to Maya and mark it urgent	Maya

The customer asks to delete their data	Assign to Maya. Don’t reply	Maya

You may act without asking when: An approved article fully answers a how-to question.

Stop and ask when: The answer depends on the customer’s account or contract.

Never: Promise a refund or a fix date.

QUALITY CHECK

- Every new request has a type tag.
- Every assigned request has an internal note.
- Every draft reply links to an approved article.

REPORT COMPLETION

Where: The help desk queue.

What to report: Nothing extra. The tag and note are the report.

Deadline: First response within one business day.

SOP: CRM Update

Update a contact in the CRM

SOP ID	SOP-VA-004
Version	1.0
Owner	John Paulo Amaro — Virtual Assistant
Last reviewed	19 November 2026
Status	Sample — approved for portfolio use
Scenario	Sample SOP — written for a fictional client scenario (Maya, a studio owner) to demonstrate method. Names, tools, and times are illustrative.

Trigger: A contact sends new details, such as a job title or phone number, by email or signed form.

Expected output: One correct record with the new details saved and a note showing where they came from.

Before you start: Open the source email or form in another tab. Never update a contact from memory or from a social media profile.

STEPS

1. Open the CRM and go to Contacts.

2. Search by the contact's email address. It is the field least likely to be shared by two people.

3. If nothing comes up, search by last name, then by company name.

4. Check the results for duplicates. If more than one record could be this person, stop and follow the duplicate rule below.

5. Open the record and compare each field you plan to change with the source.

6. Update only the fields the source supports. Use the phone format +country code, no spaces.

7. Add a note: "Updated job title and phone. Source: email from the contact, with the date."

8. Save, refresh the page, and check every new value is still there.

9. Mark the request done in the task tracker with a link to the record.

DECISIONS AND EXCEPTIONS

If this happens	Do this	Who decides
Two records match	Don't merge them. Send Maya both record links	Maya
No record exists	Create a new contact with the source attached	VA
The source conflicts with the record, such as a different company	Don't overwrite. Add a note and ask Maya	Maya
A field is missing from the	Leave the existing value	VA

source		

You may act without asking when: The source is an email from the contact or a signed form.

Stop and ask when: The source is secondhand, such as a colleague forwarding new details.

Never: Merge or delete records. Edit deal value or account owner.

QUALITY CHECK

- The refreshed record shows the new values.
- The source note is saved on the record.
- No duplicate record was created.

REPORT COMPLETION

Where: The task tracker.

What to report: A link to the updated record.

Deadline: Same business day.

SOP: Content Publishing

Publish an approved blog post

SOP ID	SOP-VA-005
Version	1.0
Owner	John Paulo Amaro — Virtual Assistant
Last reviewed	19 November 2026
Status	Sample — approved for portfolio use
Scenario	Sample SOP — written for a fictional client scenario (Maya, a studio owner) to demonstrate method. Names, tools, and times are illustrative.

Trigger: A post is marked Approved in the content tracker.

Expected output: The post is live or scheduled, every link works, and the live URL is recorded in the tracker.

Who can approve a post: Maya or the Content Lead.

STEPS

1. Confirm the tracker shows who approved the post and when.
2. Open the draft in the website's editor.
3. Check the featured image and image alt text are in place.
4. Check the title, URL slug, and meta description match the approved document.
5. Preview the post on desktop and on mobile.
6. Click every link in the preview and confirm it opens the right page.
7. Schedule the post for the approved date.
8. Once it is live, open the URL in a private browser window to confirm it loads.
9. Paste the live URL into the tracker and mark it Published.

DECISIONS AND EXCEPTIONS

If this happens	Do this	Who decides
No approval is recorded	Don't publish. Ask the author who approved it	Maya
An image is missing	Don't substitute a stock image. Ask the author for the file	Maya
A link is broken	Leave the post unpublished and send the author the link	Maya
A typo is obvious, such as a doubled word	Fix it and note it in the tracker	VA

You may act without asking when: The fix is a typo that does not change the meaning.

Stop and ask when: Anything in the post differs from the approved document.

Never: Publish a post that is not marked Approved. Edit a post that is already live.

QUALITY CHECK

- The live URL loads in a private window.
- The title and meta description match the approved document.
- Every link opens the right page.

REPORT COMPLETION

Where: The content tracker and #content in Slack.

What to report: The live URL.

Deadline: By end of day on the publish date.

SOP: Document Control & Filing

File and version-control a client document

SOP ID	SOP-VA-006
Version	1.0
Owner	John Paulo Amaro — Virtual Assistant
Last reviewed	19 November 2026
Status	Sample — approved for portfolio use
Scenario	Sample SOP — written for a fictional client scenario (Maya, a studio owner) to demonstrate method. Names, tools, and times are illustrative.

Trigger: A new or revised document is received for the client's controlled library.

Expected output: The document is filed under its unique ID at the correct version, the register is updated, and any superseded version is archived — never deleted.

STEPS

1. Check the document register for an existing ID. If the document is new, assign the next ID in sequence (format: AREA-###, for example OPS-014).

2. Apply the naming convention: ID_Title_vX.Y_YYYY-MM-DD.

3. Confirm the document has a named owner and an approval status. If approval is missing, log it as Draft and notify the owner.

4. Save the controlled copy in the Current folder. Move any superseded version to the Archive folder with its version intact.

5. Update the register: ID, title, version, owner, status, date, and a link to the current copy.

6. If the document was revised, record what changed in the version history log.

7. Notify the affected team members in the agreed channel, with a link to the current version.

DECISIONS AND EXCEPTIONS

If this happens	Do this	Who decides
Two documents claim the same ID	Stop. Do not overwrite either one — escalate to the document owner	Owner
A document arrives with no named owner	Log it as Unassigned and ask who owns it	VA
Someone asks to edit the controlled copy directly	Decline and point them to the working-copy process	VA

You may act without asking when: Assigning IDs, filing approved documents, and archiving superseded versions.

Stop and ask when: Approval is missing, versions conflict, or anyone asks for a document to be deleted.

Never: Delete a superseded version. Change an approval status without the approver's confirmation. Store controlled documents outside the library.

QUALITY CHECK

- The register matches the library: ID, version, and status agree.
- Exactly one Current version of the document exists.
- The archived copy is intact and readable.

REPORT COMPLETION

Where: The document register and the team channel.

What to report: The document ID, title, and version filed.

Deadline: Same business day.