



30-60-90 Day Roadmap

Outline performance milestones and focus areas for the first 90 days of working with a new Virtual Assistant.

Align expectations, track progress, and ensure both you and your VA are set up for success.

Driving
Innovation,
Delivering
Excellence

At My OpsBox, we blaze the trail in operational support—delivering ruggedly reliable managed services that help your business navigate obstacles, gain traction, and scale with confidence.



Introduction

The 30-60-90 Day Plan for a new Virtual Assistant (VA)

provides a clear roadmap to align expectations, streamline operations, and build a foundation for long-term success. In the first 30 days, the focus is on establishing structure—learning company systems, understanding priorities, and creating documented workflows. By setting up organized digital workspaces and communication routines, the VA gains confidence in daily operations with minimal supervision. This stage ensures all recurring tasks are clearly outlined and executed consistently.

By day 60, the emphasis shifts to optimization and performance tracking. The VA takes ownership of core responsibilities, refines workflows, and starts tracking KPIs around accuracy, responsiveness, and task completion. This phase also involves identifying opportunities for improvement and automation while deepening collaboration with the team.

By the 90-day mark, the VA is expected to demonstrate measurable impact—consistently meeting or exceeding KPIs, supporting strategic initiatives, and expanding responsibilities based on strengths. This plan transforms the VA's role from foundational support into a key contributor for growth and operational scalability.

- **30 Days:** Build structure and organization.
- **60 Days:** Achieve consistency and hit KPIs.
- **90 Days:** Deliver results and raise the bar.



30 Days

Foundation & Workflow Setup

GOAL

Establish better workflows and organized operations

Focus Areas

- Learning the company's systems, tools, and communication channels.
- Understanding business priorities, ongoing projects, and client processes.
- Creating and documenting daily and weekly task workflows.
- Organizing digital workspaces (files, email, calendar, project boards).
- Setting clear communication and reporting routines.

Expected Outcomes

- All recurring tasks have clear SOPs or step-by-step guides.
- Workflows are organized and easy to follow.
- VA is confident in daily operations with minimal supervision.



60 Days

Optimization & Performance Tracking

GOAL

Achieve smooth operations and start meeting KPIs.

Focus Areas

- Optimize existing workflows for speed and accuracy.
- Take ownership of daily, weekly, and client-facing tasks.
- Implement simple KPIs for task completion, accuracy, and responsiveness.
- Identify areas for automation or improvement.
- Strengthen collaboration with other team members.

Expected Outcomes

- Operations run smoothly and consistently.
- KPIs (e.g., task turnaround time, quality, communication) are being met.
- Business owner feels confident delegating more responsibilities.



90 Days

Growth & KPI Expansion

GOAL

Deliver measurable results and prepare for higher performance expectations.

Focus Areas

- Review performance data and highlight key wins and challenges.
- Expand role responsibilities based on proven strengths.
- Introduce higher-level KPIs focused on impact and efficiency.
- Support additional strategic or growth initiatives.
- Contribute to improving team systems and workflows.

Expected Outcomes

- Clear results are visible (time savings, improved quality, better coordination).
- KPIs are consistently met or exceeded.
- VA is ready to take on more complex tasks and help scale operations.

A KPI (Key Performance Indicator) is a measurable value used to track how effectively a task or process is being performed, helping to evaluate the VA's



VA Effectiveness Roadmap: Health (Clinics, Private Practices)

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My SubOpsBox®

My OpsBox®

My OpsBox+®

TIME	VA TASKS	IMPACT INDICATORS	VALUES & GAINS
VA Focus: Operations support, client management, scheduling, reporting			
0-30 DAYS	• Learn clinic systems & EMR • Shadow patient scheduling & follow-ups • Assist with billing and insurance tracking	• Accurate scheduling & billing, asks clarifying questions	• Practitioner has fewer interruptions, starts focusing on patient care
31-60 DAYS	• Manage recurring patient reminders • Draft social media posts, basic marketing • Track appointments & minor inventory	• Proactive task completion, minimal errors	• Practitioner gains consistent time for care and patient engagement
61-90 DAYS	• Manage insurance claims, payments, and follow-ups • Maintain social media/content calendar • Suggest process improvements, optimize workflows	• Independent, improves efficiency, tracks KPIs impact and progress	• Clinic operations run smoothly, practitioner free for strategic growth

This approach can be applied to health-related businesses such as psychiatric clinics, dental practices, physiotherapy centers, and nutrition or wellness coaching businesses.





VA Effectiveness Roadmap: Digital & Marketing (Agencies, Freelancers, Consultants)

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My SubOpsBox®

My OpsBox®

My OpsBox+®

TIME	VA TASKS	IMPACT INDICATORS	VALUES & GAINS
VA Focus: <i>Project management, content scheduling, client communication, reporting</i>			
0-30 DAYS	• Learn project management tools • Shadow client communication & content posting • Assist with email inbox and scheduling	• Completes tasks accurately, begins SOP documentation	• Founder spends less time on admin, focuses on client delivery
31-60 DAYS	• Manage client communications independently • Track project deadlines & updates • Post content per guidelines	• Proactive, minimal errors, suggests workflow improvements	• Founder/team free for strategic client work
61-90 DAYS	• Onboard new clients or team members • Manage reporting and analytics • Execute content campaigns & optimize workflows	• Independent workflow, improves efficiency, provides insights	• Team productivity increases, founder focuses on growth & new business

This approach can be applied to digital and marketing businesses such as digital agencies, freelance consultants, content creators, and social media marketing teams.





VA Effectiveness Roadmap: Starting Business (Solo Founder / Micro-Business)

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TIME	VA TASKS	IMPACT INDICATORS	VALUES & GAINS
VA Focus: Admin, marketing support, research, customer communication			
0-30 DAYS	• Learn tools & platforms • Assist with email, scheduling, basic website setup • Document SOPs	• Accurate task completion, minimal oversight	• Founder gains a few hours/week to focus on core business
31-60 DAYS	• Manage social media content & posting • Track customer inquiries & follow-up • Assist with research & competitor analysis	• Tasks completed independently, suggests improvements	• Founder spends more time on product/service development
61-90 DAYS	• Manage campaigns, customer onboarding, basic analytics • Implement automation tools • Refine workflows & SOPs	• Independent, proactive, improves efficiency	• Founder freed to focus on growth, sales, and strategic decisions

This approach can be applied to starting businesses such as solo founders, online coaches, e-commerce startups, and micro-businesses.





VA Effectiveness Roadmap: Professional Services / Operations-Based Company (Bookkeeping, Coaching, Small Service Firms)

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TIME	VA TASKS	IMPACT INDICATORS	VALUES & GAINS
VA Focus: Operations support, client management, scheduling, reporting			
0-30 DAYS	• Learn tools and client management systems • Shadow communications & scheduling • Assist with invoicing & basic admin	• Accurate execution, asks questions.	• Founder reduces daily admin load
31-60 DAYS	• Independently manage recurring communications & appointments • Track project deadlines • Prepare reports	• Minimal errors, proactive improvements.	• Founder/team free for client work and strategy.
61-90 DAYS	• Manage client onboarding & workflows • Execute campaigns or service tasks • Suggest process optimizations	• Independent, efficient, adds operational value	• Business runs smoother, founder/team focus shifts to scaling and revenue

This approach can be applied to professional services and operations-based companies such as bookkeeping firms, small law offices, coaching practices, and consulting agencies.





General Patterns Across All Categories

O-30 Days: Learning & Shadowing

Objective: The VA is getting familiar with your business, tools, and processes. Focus is on observation, understanding, and task accuracy.

Key Actions:

- Introduce the VA to all relevant tools (CRM, project management software, scheduling apps, billing platforms, marketing tools).
- Shadow the founder or admin to understand workflows, task priorities, and communication style.
- Assign simple, low-risk tasks such as data entry, email triage, or scheduling with clear instructions.
- Begin documenting processes and SOPs even in rough form.

Signs of Effectiveness:

- Tasks are completed accurately with guidance.
- VA asks thoughtful questions and shows initiative to understand processes.
- Builds a basic understanding of business workflows and culture.

Founder/Team Impact:

- Founder starts reclaiming small pockets of time.
- Reduced errors in repetitive or basic tasks.

O-30
Days



General Patterns Across All Categories

31-60 Days: Owning Recurring Tasks

Objective: The VA begins taking ownership of recurring tasks and contributing to efficiency improvements.

Key Actions:

- Delegate repetitive admin tasks fully (scheduling, reminders, basic reporting).
- Introduce semi-strategic tasks such as content posting, client follow-ups, or simple analytics tracking.
- Encourage the VA to suggest workflow improvements (shortcuts, automation opportunities, or template creation).
- Begin monitoring basic KPIs to measure effectiveness (e.g., % of appointments confirmed, tasks completed on time).

Signs of Effectiveness:

- VA completes recurring tasks accurately and consistently without reminders.
- Starts anticipating needs, flagging potential issues proactively.
- Demonstrates initiative in improving processes or tools.

Founder/Team Impact:

- Founder regains significant time to focus on high-value, strategic work.
- Reduced stress and interruptions from minor admin issues.
- Business operations become more predictable and organized.

31-60
Days



General Patterns Across All Categories

61-90 Days: Independent Workflow & Operational Value

Objective: The VA becomes a true operations partner, handling tasks independently, optimizing processes, and contributing measurable value.

Key Actions:

- Delegate semi-strategic and higher-level tasks: client onboarding, reporting, campaign execution, or project coordination.
- Assign responsibility for monitoring KPIs and improving processes proactively.
- Begin entrusting the VA with decision-making within defined boundaries (e.g., handling client follow-ups, adjusting scheduling conflicts, or implementing approved content strategies).
- Encourage the VA to train or support other team members if needed, building internal capacity.

Signs of Effectiveness:

- VA operates independently with minimal supervision.
- Identifies inefficiencies and implements solutions.
- Provides accurate and actionable reports that inform decision-making.

Founder/Team Impact:

- Founder can focus almost entirely on growth, strategy, and revenue-generating activities.
- Business operations run smoothly, even when the founder is unavailable.
- Productivity, client satisfaction, and operational efficiency improve significantly.

61-90
Days



Key Delegation Strategy

Start with repetitive admin tasks (0-30 days)

- Examples: calendar management, inbox triage, data entry, file organization.
- Focus: accuracy, consistency, and building trust.

Add semi-strategic tasks (30-60 days)

- Examples: social media posting, client follow-ups, basic reporting, inventory tracking.
- Focus: initiative, proactive thinking, and beginning to optimize workflows.

Delegate independent processes (60-90 days)

- Examples: campaign execution, client onboarding, KPI tracking, workflow optimization.
- Focus: independent decision-making within defined limits, measurable business impact.

By 90 days:

- VA should be capable of managing entire operational processes with minimal oversight.
- Can take ownership of recurring workflows, reporting, and process improvements.
- Founder's role shifts primarily to strategic growth, business development, and high-value decisions.



My OpsBox Tiers

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	Pre Ops	Sub Ops	Ops Box	Ops Box+
Fractional COO	✓	✓	✓	✓
Executive Assistant FT	✓	✓	✓	✓
Account Mgr/Backup VA	✓	✓	✓	✓
Social Media Specialist PT		✓	✓	✓
Bookkeeper PT		✓	✓	✓
Web Maintenance PT			✓	✓
Content Marketing PT			✓	✓
Call Center Team of 10 FT				✓
Call Center Manager FT				✓

*All roles provided are examples and may not accurately reflect your final proposal.

VA/EA (Virtual/Executive Assistant)

PA (Personal Assistant)

fCOO (Fractional Chief Operations Officer)



LEAD FROM THE FRONT

WE DON'T WAIT FOR SOMEONE ELSE TO CLEAR THE ROAD. WE TAKE OWNERSHIP, STAY PREPARED, AND SET THE PACE BY EXAMPLE. FCOO'S LEAD LIKE THEY OWN THE RIG.

BUILT FOR THE LONG HAUL

WE DON'T DUCT TAPE PROBLEMS. WE BUILD DURABLE SYSTEMS, HONEST RELATIONSHIPS, AND SUSTAINABLE MOMENTUM...BECAUSE THIS ISN'T A JOYRIDE, IT'S A JOURNEY WITH MULTIPLE DESTINATIONS.

KEEP IT SIMPLE AND MOVING

COMPLICATED OPS SLOW YOU DOWN. WE CLEAR THE CLUTTER, FOCUS ON WHAT WORKS, AND MAKE THE PATH SMOOTHER FOR EVERYONE ON BOARD.

STAY SHARP, STAY READY

THE TERRAIN CHANGES. WE KEEP LEARNING, STAY FLEXIBLE, AND ADAPT FAST. BECAUSE GROWTH DOESN'T HAPPEN ON AUTOPILOT.

CREW OVER EGO

NO LONE RANGERS HERE. WE MOVE AS A TEAM, COMMUNICATE CLEARLY AND WITH RESPECT, AND SHOW UP FOR EACH OTHER. CLIENTS, FCOOS, VA'S. SAME CREW, SAME CARE.

Managed Services Summary

Day-to-Day Operational Tasks Plus Chief Officer Leadership

Who we serve

- Executives
- Entrepreneurs/Founders
- Small Business Owners
- Busy Individuals

Specialized industries & roles

- Marketing Teams
- HR Departments
- SEO Professionals
- WordPress Developers
- Real Estate Agents
- Property Managers
- Financial Advisors
- Nonprofits
- Ecommerce Companies
- Agencies
- Construction and Trades
- Travel Agents
- Influencers
- Architects
- Coaches
- Physicians
- Therapists

& more!

À la carte team members

- Virtual Assistant
- Bookkeeper
- Graphic Designer
- Web Design or Maintenance
- Social Media
- Content Marketer
- Full Stack Web Dev
- Call Center

Fractional Services

- Long Term
- Integrated Member of the Team
- Operational Corporate Leadership
- Operational Strategy Development
- Maintenance of Operational Goals

Operations Services

- Process Optimization
- Organizational Design
- Dashboard KPI's & Analytics
- Data Visualization
- Operational Coaching Sessions

Don't do it alone



Book an appointment today for a complete team tomorrow

As a business services provider of highly trained and dedicated specialists, we seamlessly adapt to your business culture, and mission, to build a solid operational foundation.

www.MyOpsBox.com

