

My VA Task and Skills Worksheet

Copy this into a note or document. Fill in one recurring task first, then repeat for two others. Keep private client information out of any worksheet you share. Use your answers to choose what to practice, check or get approved.

Blank worksheet

- **Task and frequency:** What do you actually do, and how often?
- **Useful output:** What should the client receive? What makes it correct?
- **Original information and instructions:** Which records, policies or instructions must you check? Do any of them give conflicting information?
- **Sensitive information:** Does the task involve private messages, customer details, credentials or private business information?
- **Permission to use AI:** Which tool and account may you use, which tasks can it help with and what information may you enter? If permission is unclear, use invented information for practice and ask before using client records.
- **Repeatable part:** Which part follows the same rules each time? What could AI draft, extract or organize? Would a spreadsheet formula or template be easier to check?
- **Unusual or unclear information:** What is missing, conflicting or outside the usual rules? How will you handle it?
- **Person who makes the decision:** What can you decide yourself? Which decisions need approval from the client or another person?
- **Consequences of an error:** What could happen if a status, amount, date or promise is wrong?
- **Verification before delivery:** How will you compare the finished work with the original information? Which action must wait for approval?
- **Skill to practice next:** Pick one specific skill connected to this task.
- **Sample and next action:** What sample can you save to show your work and the checks you performed? What will you do next, and when?

Use action labels such as **practice with fictional data**, **ask for permission**, **test with review** or **keep manual**. These labels help you choose an action. Your future work will also depend on your client's decisions and other circumstances.

Completed example

Fictional practice example: all messages, appointment details and rules were invented for this exercise.

- **Task and frequency:** I handle customer requests to change appointments when they arrive.
- **Useful output:** The customer receives an accurate reply, and the booking changes only after the required agreement and approval.
- **Original information and instructions:** A customer asks to move a booking from Wednesday, October 14, 2026, at 3 p.m. to Thursday, October 15, at 4 p.m. The calendar shows that 4 p.m. is occupied and 5 p.m. is available. All times are in Philippine time. The manager must approve appointment changes before I confirm them or update the booking.
- **Sensitive information:** This practice uses invented text. Real customer messages and calendars may contain names, contact details and private information.

- **Permission to use AI:** I use invented text for practice. I would need the client's permission for the exact tool, account, task and information before entering real customer or calendar details.
- **Repeatable part:** AI could prepare a reply acknowledging the request. I could also use a message template.
- **Unusual or unclear information:** The requested time is occupied. The available 5 p.m. slot still needs the manager's approval and the customer's agreement.
- **Person who makes the decision:** I ask the manager whether I may offer 5 p.m. After approval, I ask the customer whether that time works. I confirm the change and update the booking only after the customer agrees and the required approval is in place.
- **Consequences of an error:** Confirming an occupied slot could create a conflicting booking. Confirming without approval could promise a change the manager has not agreed to.
- **Verification before delivery:** I compare the date, time and time zone with the calendar and instructions. Before updating the booking or sending a final confirmation, I check that the required approval and customer agreement are recorded.
- **Skill to practice next:** I practice writing a clear customer reply, checking appointment details and following the request through to confirmation.
- **Sample and next action:** I save the invented request, instructions, draft, checks and final reply. In the next session, I remove the time zone from the instructions and practice asking which time zone the customer means before comparing times.

Checked example reply and next actions

Customer reply while the request is being reviewed:

Thank you for your request. I am checking availability for Thursday, October 15. I will confirm the new appointment time once the change has been approved.

Question for the manager:

The customer requested Thursday, October 15, at 4 p.m. Philippine time, but that slot is occupied. The calendar shows 5 p.m. is available. May I offer that time to the customer?

After the manager approves offering 5 p.m., ask whether that time works for the customer. Update the booking and send a final confirmation only after the customer agrees and the required approval is in place.

This fictional example shows how to check the schedule, follow approval rules and keep the customer informed. AI may identify these requirements correctly too. If you try the method in real work, check the accuracy of the replies and measure the total time spent preparing, reviewing and completing the task. This exercise cannot establish whether clients want the service or whether a role will remain available.

Daily briefing practice example

Fictional practice project: All tasks, dates, records and instructions below were invented. This is a teaching example, separate from Jean's dashboard and client work.

Instructions and original records

Prepare a briefing for **Thursday, October 8, 2026**. Include unfinished work due today and any conflicting information that needs a decision. Completed work needs no action unless a follow-up is recorded. Preparing the briefing gives you no permission to change deadlines, approve work or send messages.

Task	Original information
Weekly report	The draft is ready. It is due October 8 and still needs the manager's approval before delivery.
Setup checklist	It was due October 7. The record confirms that it was completed on October 7. No follow-up is recorded.
Website update	The tracker lists October 9 as the deadline. A separate note says it may move to October 12. The manager has not confirmed the change.

Finished example briefing

Daily briefing for October 8, 2026

- **Needs attention today: Weekly report.** The draft is ready and due today. Ask the manager to review it so delivery can proceed after approval.
- **Needs clarification: Website update.** The tracker shows October 9, while a separate note suggests October 12. Ask the manager to confirm the deadline. Leave October 9 in the tracker until a change is approved.
- Completed work checked:** The setup checklist was completed on October 7, and no follow-up is recorded. Its older deadline does not make it an unfinished task.

Checks behind this briefing

- I compared each date with the briefing date of October 8.
- I kept the weekly report's approval requirement visible. A ready draft still needs approval before delivery.
- I checked the checklist's completed status and whether any follow-up was recorded.
- I kept the website deadline conflict visible and wrote a question for the person who can resolve it.
- I left the original records unchanged and prepared the briefing for review.

Question for the manager: Which deadline is confirmed for the website update, October 9 or October 12?

What to save for your portfolio

Save the instructions, original records, briefing and explanation of your checks. If you use AI, also save its actual response and any corrections you make. Explain which parts you handled yourself. The example above was prepared as teaching material; it is not a recorded AI test.

To practice an unusual case, remove the checklist's completion date. Record that the status says complete but the completion date is missing, then ask which information the client requires before closing the record. Keep this uncertainty visible and follow the client's rules.

This example checks a small set of invented records. Real work may involve more records, changing information or different rules for urgency. It provides no measured time saving, proof of a dashboard's accuracy or employment prediction.