FolarraStudio

Virtual Assistant Planner

support · organize · grow

UNDATED · PRINTABLE · CLIENTS, TASKS & HOURS

This Planner Belongs To

for virtual assistants and online support pros

NAME _____

BUSINESS NAME _____

EMAIL _____

WEBSITE _____

HOURS AVAILABLE _____

How to use this planner

- Print the whole planner once, then print extra copies of the pages you use most, such as the Client Task List and Hours Log pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Onboard each client with the checklist, then log tasks and hours every day.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

My business word for this year

Why I love this work

Contents

tap a title in the digital planner to jump to it

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Client Onboarding

start every client well

Before

- [ ] Discovery call
- [ ] Proposal sent
- [ ] Contract signed
- [ ] Deposit paid

First month

- [ ] Weekly check-in
- [ ] Feedback
- [ ] Adjust tasks
- [ ] Invoice sent

Setup

- [ ] Logins shared securely
- [ ] Tools access
- [ ] Communication plan
- [ ] Task list agreed

Client Profiles

who you support

CLIENT

BUSINESS

CONTACT

PACKAGE & RATE

TOOLS USED

PREFERRED CONTACT

NOTES

CLIENT

BUSINESS

CONTACT

PACKAGE & RATE

TOOLS USED

PREFERRED CONTACT

NOTES

CLIENT

BUSINESS

CONTACT

PACKAGE & RATE

TOOLS USED

PREFERRED CONTACT

NOTES

CLIENT

BUSINESS

CONTACT

PACKAGE & RATE

TOOLS USED

PREFERRED CONTACT

NOTES

Client Task List

what each client needs

TASK	CLIENT	DUE	PRIORITY	STATUS	DONE
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					☐
					☐
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Hours Log

every billable minute

DATE	CLIENT	TASK	START	END	HOURS

TOTAL HOURS

Recurring Tasks

daily, weekly & monthly

TASK	CLIENT	FREQUENCY	DAY	NOTES

Weekly Plan

client work by day

WEEK OF _____ CAPACITY _____

DAY	CLIENT	TASKS	HOURS
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			

Services & Packages

what you offer

SERVICE / PACKAGE	HOURS	PRICE	INCLUDES

Invoice Tracker

get paid on time

INVOICE NO.	CLIENT	DATE	AMOUNT	DUE	PAID
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					☐
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Income & Expenses

money in, money out

MONTH _____ GOAL _____

DATE	DESCRIPTION	CATEGORY	IN	OUT

TOTALS _____

Yearly Overview

the business at a glance

YEAR _____ GOAL _____

MONTH	JOBS	INCOME	EXPENSES	PROFIT	NEW CLIENTS
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					
Total					

Notes



FolarraStudio

Thank you!

Thank you for choosing FolarraStudio. I hope this planner helps your business run smoothly and grow. If you enjoy it, tell a friend about folarrastudio.com.

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- Questions or ideas? Write to me through folarrastudio.com, I am happy to help.

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