

FREE GUIDE FROM THE UPLEVEL

10 behaviors that separate the VA who gets replaced

The Indispensable VA

from the one who gets referred.

"I struggled with the confidence and knowing that I could do it. And then afterwards I was like — oh wait, I can really do this."

— Meghan M., VA trained through The Uplevel method

If that sentence stopped you — good. That feeling is exactly where this checklist begins.

This isn't a list of tasks. It's a portrait of a VA your client talks about. The one who gets more responsibility without asking. The one who gets referred before she ever has to market herself. For each behavior, rate yourself honestly. The gaps aren't failures — they're your roadmap.

COMMUNICATION

01 She communicates before she's asked to.

She doesn't wait for her client to wonder what's happening. She gives a quick update when something shifts, flags a risk before it becomes a problem, and closes loops on her own.

What it looks like when you have this:

Your client hasn't messaged you all morning — not because they forgot about you, but because they trust you.

How often do I do this?

○
Never

○
Sometimes

○
Always

My honest note to myself: _____

02 She brings options, not just questions.

When she hits a wall, she doesn't say "I wasn't sure what to do." She says "I see two ways to handle this — here's what I'd recommend." She makes decisions easier, not harder.

What it looks like when you have this:

Your client starts forwarding you problems directly. Because they know you'll come back with a solution.

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

PRIORITIZATION

03 She knows what's urgent without being told.

She understands her client's business rhythm well enough to know that some things can wait and some things cannot. She doesn't treat every task as equal.

What it looks like when you have this:

Your client stops putting [URGENT] in subject lines — because you already know.

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

04 She protects her client's time like it's her own.

She batches questions. She anticipates what's needed before it's requested. She makes decisions within her scope so her client doesn't have to.

What it looks like when you have this:

Your client tells someone: "My VA thinks three steps ahead. I don't know what I'd do without her."

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

PROBLEM SOLVING

05 She tries before she escalates.

When something breaks, she attempts at least two solutions first. If she still needs to escalate, she shows up with: "here's what I tried, here's what I think should happen next."

What it looks like when you have this:

Your client starts saying "just handle it" — and means it.

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

06 She builds the systems her client doesn't have time to build.

When she figures something out, she documents it. She creates SOPs, process notes, and checklists — so nothing lives only in her head.

What it looks like when you have this:

Your client realizes: if you left tomorrow, the business wouldn't fall apart. That trust changes everything.

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

ORGANIZATION

07 Her work is always findable by someone other than her.

Files are named logically. Folders make sense to a stranger. Notes exist. If she took a week off tomorrow, her client could navigate everything without a call.

What it looks like when you have this:

Your client stops asking "where did you save that?" entirely.

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

08 She tracks her own deadlines and sends reminders first.

She doesn't wait to be reminded that something is due. She owns her calendar, flags upcoming milestones proactively, and never lets a deadline surprise her client.

What it looks like when you have this:

Your client starts checking with YOU before committing to deadlines.

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

ATTENTION TO DETAIL

09 She reviews her own work before anyone else sees it.

She has a personal checklist. She re-reads before submitting. She doesn't rely on her client to catch her errors — she catches them herself first.

What it looks like when you have this:

Your client stops reviewing your work entirely. They just trust it.

How often do I do this?



Never



Sometimes



Always

My honest note to myself: _____

10 She notices what her client hasn't mentioned yet.

She flags inconsistencies. She notices that the link is broken, that the tone shifted, that the client name is misspelled in the draft. She protects her client's reputation as if it were her own.

What it looks like when you have this:

Your client says to another business owner: "You need to meet my VA." That's the referral. That's the career.

How often do I do this?

○
Never

○
Sometimes

○
Always

My honest note to myself: _____

FROM THE OTHER SIDE

"It has increased my worth tremendously — not just in the confidence she's given me, but the skill set and the viewpoint that I bring to businesses."

"Learning how to zoom out and see everything from a strategic standpoint — what goes beyond just accomplishing tasks? What's the bigger picture? How could I step in and help in other areas?"

— Meghan Masten, after 8 months of training through The Uplevel method

Before you close this — write this down.

The Indispensable VA I'm becoming handles:

And the thing my client will be able to say about me is:

The Uplevel: 4 weeks of 1:1 coaching to become the VA you just described.

Real frameworks. Real implementation. A client relationship that changes because *you* changed.
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The Uplevel by Lorin Silva · A 4-week 1:1 VA development program