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# TASKS

YOU CAN DELEGATE, TO ELEVATE



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## HOW TO USE THIS GUIDE

A virtual assistant helps you focus on your zone of genius by taking on tasks that don't require your unique skills.

We've compiled a list of the most popular tasks to delegate, helping you identify areas where a VA or specialist can support your business growth.

*As you review the following pages, note down the tasks that:*

- *are not being done,*
- *or are currently being done by you but could be delegated.*

Our goal is to help you focus on the tasks you love, increase profitability, and give you your life back!

Freedom to Lead. Freedom to Live.

To learn more about how we can help, schedule a [15-minute call](#) with us.



## AI AND YOUR BUSINESS

### OUR APPROACH

We understand the potential of AI to save time and enhance outcomes for our clients. However, we also recognise the importance of privacy and protecting your intellectual property.

During our onboarding process, we'll have a conversation about AI and how it can be leveraged to benefit your business. We'll discuss your comfort level with AI usage and establish clear guidelines to ensure your intellectual property remains secure.

Rest assured, we only use AI with your explicit permission. Our goal is to follow your lead and use AI in a manner that aligns with your preferences and business needs.





## SCHEDULING

Manage your calendar, schedule appointments, and coordinate meetings.



## EMAIL

Filter, organise, systemise, and respond to emails on your behalf.



## RESEARCH

Conduct online research for projects, competitors, or industry trends.



## PROOFREADING

Review and edit documents for grammar, spelling, and formatting errors.



## PRESENTATIONS

Create engaging presentations using PowerPoint or other software.



## FILE MANAGEMENT

Organise and maintain your digital files and folders.



## MEETINGS

Organise and attend digital meetings and take detailed notes, summaries or minutes.



## CRMS

Update and maintain databases with accurate information.



## CONTRACTS

Maintain and organise contracts, track renewals, and ensure compliance with terms.



## POLICIES

Assist in drafting, reviewing, and updating company policies and procedures.



### BRANDING

Create logos, brand guidelines, and visual identity elements.



### GRAPHIC DESIGN

Design brochures, flyers, business cards, and other marketing materials.



### SOCIAL MEDIA

Create graphics, animations, and videos for social media campaigns.



### INFOGRAPHICS

Develop informative and visually appealing infographics.



### WEBSITE DESIGN

Design website banners, call to actions, and other visual elements.



### TEMPLATES

Create reusable templates for documents and presentations, to maintain consistency and save time.



### PHOTO & VIDEOS

Edit and enhance photos and videos for various purposes.



### PRODUCT PACKAGING

Design eye-catching packaging for products.



### ILLUSTRATIONS

Create and protect custom illustrations for various media.



### EMAIL DESIGN

Design visually appealing email newsletters and signatures.



### VENUE SOURCING

Research and secure suitable venues for events based on requirements.



### INVITATIONS

Design, send, and track event invitations and RSVPs.



### VENDORS

Coordinate with vendors such as caterers, decorators, and entertainers.



### AGENDA PLANNING

Develop detailed event agendas and timelines.



### REGISTRATIONS

Manage online event registration and attendee lists.



### ONLINE EVENTS

Assist with setup, promoting, and managing online events including technical support.



### BUDGETING

Track event expenses and manage budgets.



### LOGISTICS

Arrange transportation, accommodation, and other logistical aspects.



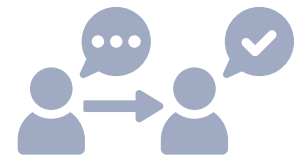
### SPONSORSHIP

Identify and reach out to potential event sponsors.



### FOLLOW UP

Send thank-you notes, gather feedback, and compile event reports post event.



### **GATEKEEPER DUTIES**

Screen emails, requests and meetings to prioritise and protect your time.



### **TRAVEL**

Book flights, hotels, and transportation, and create detailed travel itineraries.



### **EXPENSE REPORTS**

Prepare and submit expense reports on your behalf.



### **PROCUREMENT**

Assist with sourcing and purchasing goods or services.



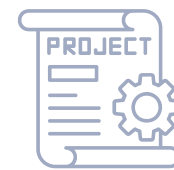
### **MEETING FACILITATION**

Prepare meeting agendas, take minutes, and follow up on action items.



### **RELATIONSHIPS**

Nurture, communicate and strengthen key relationships.



### **PROJECT COORDINATION**

Assist with planning, organising, and tracking progress of projects.



### **STAKEHOLDERS**

Draft and send communications to key stakeholders on your behalf.



### **RESEARCH**

Conduct research on various topics so you have the information you need, when you need it.



### **CONFIDENTIAL**

Manage and protect confidential information and sensitive documents.



**ACCOUNTS PAYABLE**

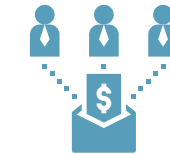
Process invoices, ensure timely payments, and maintain vendor relationships.

**ACCOUNTS RECEIVABLE**

Prepare and send invoices, track payments, and follow up on overdue accounts.

**RECONCILIATIONS**

Reconcile bank statements with financial records to ensure accuracy.

**PAYROLL**

Calculate and process employee salaries, taxes, and benefits.

**REPORTING**

Liaise with accountant to prepare monthly, quarterly, and annual financial reports.

**BUDGET PREPARATION**

Assist in creating and managing departmental or company budgets.

**EXPENSE TRACKING**

Monitor and categorise expenses to ensure adherence to budgets.

**TAX PREPARATION**

Gather necessary documents and assist with preparing tax returns.

**CASHFLOW**

Monitor cash inflows and outflows to ensure sufficient funds are available.

**ANALYSIS**

Conduct basic financial analysis to support decision-making processes.



## SOCIAL MEDIA

Create and schedule posts, engage with followers, and monitor social media metrics.



## EMAIL MARKETING

Design and send newsletters, promotional emails, and targeted campaigns.



## CONTENT CREATION

Write blog posts, articles, or website copy to engage and inform audiences.



## SEO OPTIMISATION

Research keywords, optimise website content, and monitor search engine rankings.



## ANALYTICS

Analyse and report on marketing campaign performance using tools like Google Analytics.



## COMPETITOR RESEARCH

Monitor competitors' marketing strategies and identify opportunities for differentiation.



## LEAD GENERATION

Assist with creating and managing lead magnets, such as e-books or webinars.



## INFLUENCER OUTREACH

Identify and communicate with potential influencers for collaborations or partnerships.



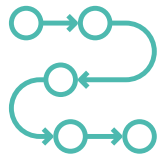
## MARKETING COLLATORAL

Create or update marketing materials such as brochures, case studies, or product sheets.



## AD CAMPAIGNS

Assist with setting up, monitoring, and optimising online ad campaigns.



### STRATEGIC PLANNING

Facilitate the development and implementation of short-term and long-term business strategies.



### PROCESS OPTIMISATION

Analyse current processes and recommend improvements for increased efficiency and productivity.



### TEAM MANAGEMENT

Oversee and coordinate the work of team members, contractors, or freelancers.



### KPI TRACKING

Establish and monitor key performance indicators (KPIs) to measure business success.



### QUARTERLY REVIEWS

Conduct quarterly business reviews to assess progress, identify challenges, and adjust strategies as needed.



### SYSTEMS & PROCESSES

Create, maintain and review standard operating procedures (SOPs) and workflow documentation.



### ONBOARDING

Assist with recruiting, interviewing, and onboarding new team members.



### TRAINING

Coordinate training and professional development opportunities for team members.



### EXIT STRATEGY

Develop and implement succession plans for key roles within the organisation.



### LEADERSHIP SUPPORT

Empowering leaders through focus, ideas, decisions, support & accountability.

## A TEAM APPROACH

- ✓ Collaborative Leadership Integration: Our Virtual Business Managers seamlessly integrate into your leadership team, providing strategic support and accountability to ensure your business objectives are met. They manage, so you don't have to.
- ✓ Comprehensive Support Network: We offer a team of highly qualified assistants and experts to manage daily operations, administrative tasks, and business development projects, freeing up your time and energy for higher-level focus.
- ✓ Scalable and Flexible Solutions: Our service adapts to your business needs, allowing for scalable and flexible support that grows with your business, ensuring sustained success and profitability.





"The biggest bottleneck in business is not enough WHOs."

- Dan Sullivan

**NEXT STEP**

# **CLARITY CALL**

We're here to help.


**CLICK TO BOOK**

# CONTACT US



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