



Most Commonly Delegated Tasks

Do you perform any of these when you could be doing revenue producing activities instead? These are some of the things most commonly delegated to a virtual assistant.

Organization and Maintenance

- Schedule appointments and manage calendars
- Enter/scan business card information into contacts database
- Data entry
- Create and manage online storage/collaboration space
- Scan documents for electronic filing
- Create and manage spreadsheets
- Set up and manage databases
- Create forms
- Format documents
- Organize email folders
- Track expenses
- Track inventory
- Update rosters
- Organize receipts
- Set up and sync online calendars
- Maintain process and procedure manuals
- Conduct online research projects
- Bookkeeping

Coordination

- Project coordination and management
- Meeting/event planning and logistics
- Trade show coordination
- Coordination of printing and ordering materials
- Coordination of speaking engagement details
- Schedule appointments
- Handle complaints or billing disputes

Marketing and Growth

- Create email marketing template
- Create autoresponders
- Website updates
- Create and distribute e-newsletters or print newsletters
- Create and distribute press releases
- Create and revise PowerPoint presentations
- Compile charts and graphs for reports



- Online article publishing
- Create or revise marketing materials
- Create and manage social media accounts (Twitter, Facebook, LinkedIn, Google+, etc.)
- Update blog
- Identify other blogs on which to comment
- Proofread, edit and write articles
- Implement online marketing plans
- Identify potential partners, events, speaking engagements, etc.

Customer Service and Relationship Building

- Draft/send email or print correspondence
- Address, hand-write, and send cards (holiday, birthday, thank you)
- Place phone calls on your behalf
- Send gifts
- Create and send email newsletters
- Address all incoming requests and questions for the company
- Request and provide information to customers and partners
- Conduct client satisfaction surveys
- Connect with people via social media accounts

Sales Assistance

- Send materials to sales prospects
- Schedule appointments and follow up calls
- Enter contacts and record meeting notes in CRM
- Format, send, and track proposals
- Format, send, and track contracts
- Research leads and competitors
- Call companies to identify the appropriate contact
- Create, send, and track invoices
- Process payments
- Coordinate shipping logistics for products

Personal Assistance

- Travel research and reservations
- Online research
- Shop/reserve products online
- Research products and services
- Make dinner reservations
- Purchase gifts and cards
- Online grocery shopping
- Coordinate carpool duties

To be as productive as possible, identify items you are currently doing that are not the best use of your time, and delegate them to the appropriate people.

To find the right virtual assistant to help you with some of the items above, contact Assistant Match at info@assistantmatch.com or 800-403-5506, or start the process online at www.assistantmatch.com.