THE ULTIMATE VA TASK CHECKLIST™

160 Tasks That Can and Should Be Outsourced to Virtual Assistants

Calendar Management		Not Now	Yes Now	System Built
1	If requested, schedule meetings with people and put in manager's diary			
2	If requested, reconfirm manager's appointments 24 hours before meeting			
3	Look 2 weeks ahead and ensure meeting details are in the diary			
4	If the meeting is off-site, block the travel time and link to map			
5	After meetings, ask if notes are needed and if so put into CRM			
6	If requested, book meeting room and add details in manager's diary			
7	If requested, make restaurants bookings and put in manager's diary			
8	If requested, book accommodation and put in manager's diary			
9	If requested, book flights and add details in manager's diary			
10	Put staff birthdays in a calendar and remind manager as requested			

Admin Tasks		Not Now	Yes Now	System Built
11	When you learn anything new, make a system in Google Sites			
12	Work with manager to help them document systems in Google Sites			
13	When trained, take systems and turn them into 1-page flowcharts			
14	If requested, attend meetings with manager and take meeting minutes			
15	When trained, assist manager with stock take and re-ordering new stock			
16	When trained, work with manager to pay outstanding invoices			
17	Ensure files added to Google Drive, Dropbox are correctly labeled			
18	When required, prepare travel itineraries for manager or team members			
19	If requested, track missing or delayed packages and ensure they arrive			
20	If requested, help manager organise company events and parties			

Customer Service		Not Now	Yes Now	System Built
21	Check all incoming emails and delete all spam messages for manager			
22	Work with manager to identify wanted promotional emails and forward			
23	Work with manager to identify unwanted promotional emails and archive			
24	Work with manager to write canned replies to all common emails			
25	Check company Inbox 3-4 times per day and reply to common emails			
26	For difficult emails, notify the manager and support them to reply			

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27	Check company Spam Folder once a day to find and retrieve non-spam			
28	When trained, answer incoming phone calls and assist with enquiries			
29	Check company voicemail 3-4 times per day and call back or forward			
30	When trained, make outbound phone calls to leads and customers			
31	Check Facebook page messages and reply or forward all messages			
32	If you have Live Chat on website, manage all messages and reply			
33	Email or call people that have recently left a Review to say thank you			
34	When trained, review feedback forms and summarise key findings			
35	If requested, organise gifts or hampers to be sent to VIP clients			

Sales Support		Not Now	Yes Now	System Built
36	When trained, assist manager to respond to sales inquiries ASAP			
37	When trained, work with manager to prepare sales proposals/quotes			
38	Work with manager to improve quality and speed of proposals/quotes			
39	When trained, work with manager to prepare and send all invoices			
40	When trained, follow up all outstanding invoices and seek payment			
41	When trained, enter new customers or orders into company system			
42	When trained, assist manager with the onboarding of new customers			
43	When trained, assist manager to send clients Happy Birthday messages			
44	Work with manager to review and update your price list as required			
45	Work with manager to plan future sales campaigns and promotions			

Project Management		Not Now	Yes Now	System Built
46	Take any new task given to you and put into a task management tool			
47	Check tasks due today and complete them or mark percentage complete			
48	If you have a lot of tasks, ask your manager to help prioritise your list			
49	When trained, oversee your manager's task list and keep it updated			
50	When trained, oversee the task list of other assistants and team members			

Website Update & Management		Not Now	Yes Now	System Built
51	Work with manager and copywriter to add new content to website			
52	Add new posts/pages to blog when you have new articles/videos			
53	Ensure all images on the website are optimised for size and SEO			
54	Test website on various devices and make a list of all the errors			
55	Run a speed test on the website and make a list of issues to fix			

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56	Work with website developer to manage and fix all the errors			
57	Use tools like YOAST to fix all titles and descriptions for SEO			
58	Use tech tools to find, fix or redirect all dead website pages			
59	Work on increasing the number of backlinks to company website			
60	If using WordPress, update to the latest version and manage plug-ins			
61	Set up Google Tag Manager and ensure desired tracking is working			
62	Review Google Analytics, gather insights and report key findings			
63	Set up Google Goals to discover the conversion rate of key pages			
64	Set up Google Optimize to split-test headlines and images on site			
65	Install HotJar on your website, review results and report findings			
66	Work with manager to create and update your website's FAQs page			
67	Review support emails monthly to suggest possible website changes			
68	Work with manager to review new testimonials and put on website			
69	Set Up Google Alerts, scan daily and report key findings to manage			

Ecommerce (If needed)		Not Now	Yes Now	System Built
70	Work with manager to write titles and descriptions for new products			
71	When you're trained, collect and edit all images for new products			
72	If required, make short promotional videos to go with new products			
73	When you're trained, add new products into your shopping cart			
74	Test new product pages on desktop and mobile to ensure it's right			
75	When trained, add new products onto Amazon and manage marketing			

CRM Management		Not Now	Yes Now	System Built
76	Review all new contacts daily and delete any spam emails			
77	Review new contacts and capitalise the first letter of names			
78	Ensure all mobile phone numbers are properly formatted for SMS			
79	Remove subscribers from your list that requested to be removed			
80	Find emails perpetually hard bouncing, call/SMS to get a new email			
81	If a mail is returned to sender, call/SMS to get a new postal address			
82	Go through CRM to find leads that are slipping away and alert manager			
83	After meetings, ask manager for notes and outcome and update CRM			
84	If required, create new customers lists for future marketing campaigns			
85	If required, work with team members to prepare labels for mail outs			
86	Send a weekly report to your manager with numbers of new leads			

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87	Work with manager to discuss what activities could be automated			
88	When trained, work with manager to plan and build auto-responders			

Email Marketing		Not Now	Yes Now	System Built
89	Work with manager to plan marketing emails needed for the month			
90	Work with copywriter to get the copy required for marketing emails			
91	Enter emails with copy, images and links into your email platform			
92	Send manager final tests of marketing emails and get approval			
93	Send out marketing emails at the agreed time and monitor results			

Content Creation		Not Now	Yes Now	System Built
94	Use tools like Answer the Public to research content ideas			
95	Study industry blogs, forums and groups to find content ideas			
96	Work with manager to decide topics you will create content on			
97	Find articles or content that can be shared via social media			
98	Work with manager to write copy to go with the social posts			
99	If needed, use tool like Otter.ai to convert audio into text			
100	Work with the copywriter to turn audio and text into articles			
101	Find royalty-free images to accompany articles and social posts			

Podcasting		Not Now	Yes Now	System Built
102	Find podcasts where your manager can be interviewed as a guest			
103	Send email to podcast hosts offering your manager as a guest			
104	If company has a podcast, find and email guests for your podcast			
105	If company has a podcast, edit podcast recordings and save them			
106	If company has a podcast, upload to podcast hosting platform			
107	If company has a podcast, prepare and launch new episodes			

Video Marketing		Not Now	Yes Now	System Built
108	Help manager plan out videos that need to be recorded			
109	When trained, manage the editing and exporting of videos			
110	Write titles, descriptions and promotional copy for videos			
111	Manage the uploading of videos to YouTube and other places			
112	Manage all the comments that appear in response to videos			
113	Review the stats of your YouTube Channel and find insights			

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Graphic Design in Canva		Not Now	Yes Now	System Built
114	Design posts for Facebook, Instagram, LinkedIn, etc			
115	Design stories for Facebook and Instagram			
116	Design promotional images that go into emails			
117	Design flyers or posters for upcoming promotions			
118	Design infographics to feature alongside content articles			
119	If required, design Facebook and Instagram image ads			
120	If requested, design invitations, brochures or cards			
121	If requested, design presentation slides for your manager			
122	When trained, work with manager and writer to design Mobimag			
123	When trained, work with manager and writer to design Mobimag			

Social Media Management		Not Now	Yes Now	System Built
124	Resize and crop photos before uploading to social media			
125	Research and document ideas for future social media content			
126	Use social media scheduling tool to save time (personal pages)			
127	Use social media scheduling tool to save time (company pages)			
128	Work with manager to reply to social media comments or DMs			
129	Work with manager to comment on posts made by key contacts			
130	Send Happy Birthday messages to friends on Facebook			
131	Check Facebook Groups and look for posts to engage with			
132	If company has a Facebook Group, manage aspects of running it			
132	Accepting or declining LinkedIn connection requests			
134	Work with manager to update and then maintain LinkedIn Page			
135	When trained, assist manager to manage their LinkedIn			

Marketing		Not Now	Yes Now	System Built
136	When trained, create a list of businesses you can partner with			
137	When trained, work with manager to reach out to new partners			
138	When trained, make outbound phone calls to find more customers			
139	When trained, monitor Facebook Ads account and report results			
140	When trained, find new LinkedIn connections for your manager			
141	When trained, monitor SourceBottle and alert manager to opportunities			

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Finance		Not Now	Yes Now	System Built
142	When trained, work with manager to do basic bookkeeping tasks			
143	When trained, work to track expenditure compared to budgets			
144	When trained, manage the sending of receipts to clients			
145	When trained, manage the issuing of refunds to clients if approved			
146	If requested, find missing receipts for tax records purposes			

Human Resources (HR)		Not Now	Yes Now	System Built
147	Work with manager to create job descriptions and ads for new hires			
148	When trained, post new job ads onto required job boards/sites			
149	When trained, assist manager to review and filter new job applicants			
150	When trained, assist manager with the onboarding of new employees			
151	Set reminders for staff birthdays, work anniversaries, performance reviews			

Research		Not Now	Yes Now	System Built
152	When trained, research target market and prepare findings for manager			
153	When trained, research competitors and prepare findings for manager			
154	When trained, research awards you can enter and prepare submissions			
155	If requested, find workers on Fiverr or Upwork to complete key jobs			
156	If requested, research suppliers for works, create brief and request 3 quotes			
157	If requested, find new technology tools and summarise findings for manager			
158	If requested, research industry trends and summarise findings for manager			
159	If requested, attend webinars for your manager and summarise findings			
160	If requested, research gifts for staff, customers, family or friends			

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