



THE OVERWHELMED BUSINESS OWNER'S DELEGATION CHECKLIST

Check all that you would love to take off your plate

Administrative Support

- ☐ Build or manage databases (contacts)
- ☐ Manage online calendars
- ☐ Online File Management (Google Drive)
- ☐ Data Entry
- ☐ Create Forms
- ☐ Draft email templates
- ☐ Send cards/gifts
- ☐ Set up spreadsheets
- ☐ Draft Power Point slides
- ☐ Coordinate with vendors
- ☐ Update Member records

Email Management

- ☐ Reply to common questions
- ☐ Flag important messages
- ☐ Follow up on sent emails
- ☐ Draft responses
- ☐ Delete spam
- ☐ Unsubscribe from unwanted promotional lists
- ☐ Tag and archive emails

Project Management

- ☐ Monitor project progress
- ☐ Create status reports
- ☐ Set up new projects using templates
- ☐ Monitor cost estimates and budget
- ☐ Set up new tools
- ☐ Format documents

Finance

- ☐ Create invoice templates
- ☐ Send invoices
- ☐ Cash flow maintenance
- ☐ Reconcile bank and credit cards
- ☐ Enter payables and receivables
- ☐ Create Month-End and Year-End reports

Customer Service

- ☐ Handle customer inquiries
- ☐ Follow-up on orders
- ☐ Invite /approve requests to join membership community
- ☐ Set up/update CRM

Event Management

- ☐ Research leads for guest speakers
- ☐ Communicate and coordinate with guest speakers
- ☐ Available for event admin assistance
- ☐ Moderate chat during online events
- ☐ Manage post-event feed back (send audience surveys or follow up with speaker)
- ☐ Schedule email campaigns

Email Marketing

- ☐ Set up auto-responders
- ☐ Schedule email campaigns
- ☐ Design email templates
- ☐ Manage e-newsletter
- ☐ Clean up email database



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Social Media & Community Management

- ☐ Promote new posts across various social media channels
- ☐ Promote old posts via social media
- ☐ Promote posts of others via social media
- ☐ Share images/videos/articles
- ☐ Reply to mentions/messages/comments on social media
- ☐ Set up social scheduling tools
- ☐ Upload content to social scheduling tools
- ☐ Write or update online business profiles
- ☐ Re-purpose content into social posts
- ☐ Track engagement metrics
- ☐ Invite followers to attend events

Content Production/ Support

- ☐ Source photos
- ☐ Edit photos
- ☐ Create graphics
- ☐ Upload posts
- ☐ Set featured images
- ☐ Format posts to be published
- ☐ Schedule posts for publication
- ☐ Add internal links to posts
- ☐ Add affiliate links to posts
- ☐ Add content upgrades
- ☐ Proofread/edit posts
- ☐ Topic research

Notes



