



# 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 of 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

