

117 TASKS YOU CAN DELEGATE

TO A GREAT ASSISTANT



DEAR ENTREPRENEUR,



Six years ago I finally reached “The Promised Land” as a Coach and Consultant.

An 8-day vacation in Hawaii with no phone, no meetings, and - best of all - NO EMAIL.

Even better? When I came home, there were only 25 emails in my inbox. No “welcome home” avalanche of 500 messages.

My secret?

Her name is Denise.

She’s been my Executive Assistant for over two years now.

Denise handles tons of my day-to-day tasks like my email inbox, scheduling appointments (such a life-saver), and even personal items like booking my house cleaner and organizing dinner parties.

Below I list over 117 tasks you could delegate to an Assistant too. Hopefully that gives you a vision of what’s possible when you’ve got a properly chosen, trained, and managed Executive Assistant.

May this year be your best yet!

Timothy Francis

Tim Francis
Founder, Great Assistant



Me with Denise. After working together virtually for over a year, this day was the first-time we ever met in-person.

P.S. We have a FREE training on “How to Hire Your Assistant” which outlines the 3 key areas to focus on when hiring your Assistant. To watch this training, go to www.GreatAssistant.com/hiringplan.

What to Delegate?

There's four categories of tasks your assistant can take on:

- 1) **General Admin:** the predictable stuff such as creating invoices, customer service, etc.
- 2) **Managing You:** your inbox, calendar, travel, etc; this is probably new territory for you, expect it to feel odd in the beginning, but you'll quickly love it
- 3) **Managing Projects & Doing Follow-Up:** many projects need your visionary shove to put them in motion. After that, though, it's largely just a matter of coordinating and babysitting things across the finish line.

For example, hosting a live event: picking the city, venue, and calling a few influencers might be your role. But then all the logistics like catering, audio-visual, presentation materials, etc....

Weeks of keeping "spinning plates in the air," following-through on tons of details, are far better accomplished by your Assistant.

- 4) **The Middle 80%:** you may not realize it, but most tasks you do can be unpacked into smaller pieces, many which can be passed to your Assistant.

For example, recording a podcast episode:

- **You:**
 1. record audio
 2. write show notes
 3. write copy
- **Assistant:**
 4. edit audio
 5. export to WAV
 6. upload to server
 7. add show notes to podcast episode
 8. create new blog post
 9. add show notes to body
 10. embed audio player to body
 11. publish blog post
 12. test blog post on 3 devices (iPhone, iPad, desktop) to ensure everything working
 13. setup email broadcast to announce new episode
 14. store audio files to proper Dropbox folder
 15. write you to let you know everything's done and scheduled

Remember: You do the first ~10% of the job, then your Assistant takes it from there. You may coach and review a bit along the way, but 80% of the work is theirs!

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Here's a partial list of tasks Denise does / has done for me:

Email Inbox

- read all incoming email to delete junk / unsubscribe, and also tag crucial Tim-only emails for me to review and reply
- catch interview requests and schedule quickly
- setup meetings for \$1,000/hr clients, Kolbe Consults and other clients
- handle customer service questions
- setup new filters / labels / tags for new contacts
- triage and forward emails to other team members if task / response is their responsibility instead

Calendar

- Manage all appointments during business day; dealing with all the back-and-forth of scheduling
- Handling cancellations and updating calendar accordingly
- Ensure I have all meeting info (agenda, time zone, directions, other person's bio, etc) so I can open appointment and GO!
- Monitor who gets onto my calendar; blacklisted people never get on.

- Rescheduling any appointments due to last minute changes in plans

Website / Wordpress / Sales Pages (UPDATED)

- Create page-pages and post-pages
- Create sales pages for online products and webinars
- Create Thank-You / Success pages
- Embed Infusionsoft forms for opt-ins
- Embedding videos and pics where needed.
- Setup and/or update product links to our shopping cart
- Handle tech issues when they occur by hiring someone to fix issues, or contacting tech support
- Make edits across all websites when small changes arise, e.g. new phone number on site
- Manages domain hosting account and handle any issues that arise

Creating Systems

- Writing procedures according to our in-house method

- Organizing procedures properly inside Google Drive and Teamwork.
- Ensuring files get named to our protocol, then filed to the proper location in our online storage (we use Egnyte, not Dropbox)
- Researching and testing new software for use in day-to-day operations

Hiring & Onboarding

- Posting Job openings
- Monitoring & filtering incoming applications
- Coordinating Kolbe Tests and other initial steps for applicants
- Scheduling interviews
- Copying, pasting, preparing our on-boarding process for new hires
- Setting up all accounts new hire will need (email account, Convo)
- Sharing all Google Docs new hire will need

YouTube / Podcast

- Upload episodes
- Add show notes and tags
- Format to correct settings
- Publish to account

Invoicing

- review all incoming invoices to make sure they're complete and clear, so I can pay them all at once (no back-and-forth hassle)
- Pay (some) contractor invoices
- Maintain folder of receipts for all paid invoices
- Prepare and send out invoices to clients with recurring charges

Client Care

- send flowers and greeting cards when our \$500/hr clients have life milestones (e.g. baby born)
- find out from clients what they're personal interests are so we can send gifts of appreciation
- buying and coordinating gifts on Amazon

Infusionsoft

- add a contact
- create tags specific to each category
- create invoice(s)
- setup products and order forms
- setup campaigns and sequences in Campaign Builder
- create & format emails for sequences and broadcasts
- schedule broadcasts

- process credit cards
- update mailing addresses
- update credit card information
- process refunds
- keep track of accounts receivable & run reports for the same
- test shopping cart

Kolbe Requests

- Receive test requests
- process payments
- allocate tests
- schedule consultation time for client w me
- pull Kolbe results for teams and create aggregated reports

Travel (UPDATED)

- Booking accommodations
- Booking flights
- Booking / coordinating ground transportation
- Making dinner reservations
- Ordering event tickets
- Ordering groceries on Instacart so my AirBnb has all my preferred food upon my arrival

Networking (UPDATED)

- Setting up meetings with people I want to stay in touch with. Could be virtually (Skype / Zoom), or in-person such as coffees, lunches, dinners

- Getting mailing addresses for everyone I want to send thank-you / greeting cards to.
- Arranging helper to pick up postage, come address all envelopes, and put greeting cards in the mail
- Reminding me of people I want to text, call, meet with to build relationships

Paperwork

- Arrange for helper to come over and file receipts
- Arrange for helper to come over and open mail, file statements to filing cabinet

Members Area

- Upload webinar replays
- Add and format replay page
- Notify members of new replay via email
- Post new webinar to Facebook
- Create new member groups and pages as required

Google Adwords & Facebook Ads

- Adding tracking codes and pixels onto our website
- Handle all admin issues including expiring credit cards
- Pulling reports as needed for internal analysis

- Read incoming messages (FB Fan Page) and forwarding or replying as needed

Webinars

- Setup GoToMeeting / GoToWebinar
- Announce in our members area
- Announce on Facebook page
- Announce to email list

Dinner Parties

- Contact desired guests
- Distribute map to my house, including where to park
- Ensure no allergies or diet restrictions
- Distribute dress code and schedule
- Arrange for groceries to get delivered (by a friend we pay)

Event Planning

- Finding and/or researching venue options
- Scheduling and confirming event date and time
- Working with venue staff regarding requirements and setup of room

- Finding and confirming assistants to help with front registration desk
- Finding and confirming videographer
- Finding and confirming Emcee
- Finding and confirming event catering
- Sending out event notices through Infusionsoft and text messaging
- Responding to inquiries regarding event details
- Posting event details to Meetup.com
- Posting event details to our Facebook page
- Prepare any event materials, as directed
- Printing and coordinating pick-up of printed materials
- Setting up & ensuring Square account has the correct products and pricing for receiving event payments
- Doing post-event reports so we know our Cost-per-Attendee

Financial (NEW!)

- Downloading sales transactions from Infusionsoft, then pasting

into our financial tracking spreadsheets

- Downloading expense transactions from our online banking, then pasting into financial spreadsheets
- Tagging and categorizing different expenses so they work with accountant's categories
- Monitoring and notifying of weird transactions
- Preparing month-end commission / affiliate reports
- Collecting all monthly invoices and placing in one place in my email so it's easy to pay all at once

Personal

- Schedule housecleaner and put on calendar
- Schedule haircuts and put on calendar
- Make dinner reservations
- Research, fun events to attend or activities to do, as requested
- Locate, purchase and send gifts / flowers, as requested
- Schedule "Free Day" activities such as: golf, massages, drum lessons, etc.

Get Your FREE 24-Hour Pass “How to Hire Your Assistant Plan”



On this training, we cover the 3 key areas to focus on when hiring your Assistant so you avoid the “Trough of Sorrow” most Entrepreneurs fall into...

Including...

- How to manage your expectations VS reality when you embark on this process
- At what point does your Assistant get over the “Trough of Sorrow”, meets your expectations, and exceeds your expectations
- The “Easy” button to getting your own North American Assistant to handle the mundane day-to-day tasks in your business

Get Your FREE 24-Hour Pass Here

www.GreatAssistant.com/hiringplan