TIME IS YOUR MOST VALUABLE ASSET

Take It Back

Last year alone, we helped entrepreneurs take back 30,000+ hours.

Here’s a sample of the tasks we tackle. Using your goals, we create a customized strategic delegation plan to maximize impact and time savings.

DELEGATE

PROCESS CREATION, CAPTURE & MANAGEMENT

1. Client & employee onboarding/offboarding
2. Scorecard metrics
3. Top 20 outreach
4. Gifting process
5. Ideal Week calendar gatekeeper
6. Manage and store data
7. Schedule invites + confirmations
8. Online course management
9. Team training
10. Recurring event management
11. Post-Coach Learning day follow-up
12. How-to videos + transcriptions
13. Review meeting audio and convert to a to-do list
14. CRM Management — best practices and entry
15. Accountability management to keep on top of your team
16. Client Session follow-up
17. All repeatable tasks to ensure anyone can step in and do them
18. Engagement letters, contracts and invoices
19. Certifications and Continuing Ed
20. Schedule headshots and gather team info for website
21. Create email templates for use in processes
22. Develop podcast process and scheduling

EMAIL ASSISTANCE

1. Monitor your inbox while you're on vacation
2. Daily inbox management and cleanup
3. Add emails to your contact database
4. Set up labels and filters
5. Turn emails into tasks in Asana
6. Forward emails to client team members on your behalf
7. Unsubscribe you from spam
8. Deploy drip emails
9. Create new accounts in GApps
10. Send scheduling confirmation reminder emails

MARKETING

1. Add email addresses in email marketing platform
2. Configure email marketing campaigns
3. Coordinate with designer and team on a new promo piece
4. Coordinate online event logistics
5. Post articles to social media and blog
6. Manage Google Alerts
7. Order & maintain new website domains
8. Research affiliates
9. Gather and monitor website analytics
10. Automate mail-merged email sales follow-ups
11. Coordinate distribution of workbooks and welcome kits to new clients
12. Set up Hootsuite to pre-schedule social posts
13. Use Canva to create graphics
14. Build automations and workflows inside CRM
15. Clean up a legacy CRM
16. Data Mining prospect research
17. Monitor social media interactions for sales leads

RESEARCH

1. Source new vendors and resources
2. Sales data mining
3. New tool research
4. Membership cancellation research and tracking
5. Research and order holiday and birthday gifts
6. Source new sites to advertise for jobs postings
7. Research travel/train/plane/hotel options
8. Research event logistics and pricing
9. Identify industry leader/influencer contact info
10. Find fun family activities
11. Mine and submit for speaking opportunities
12. Look for prospects using LI SalesNavigator, etc.
13. Find best pricing for office supplies
14. Research best practices around how to handle complex situations
15. Source new team building activities for retreats
16. Research best practices & office requirements during Covid-19

PROJECT MANAGEMENT & REPORTING

1. Monthly membership reporting
2. Warm lead phase reporting
3. Expense Reporting
4. Rock completion accountability management
5. Operational dashboard updates
6. Monitor survey responses and create a spreadsheet
7. Manage trademark registration process
8. WBE submission project management
9. Manage external vendors and teams to complete large-scale projects
10. Map out due dates of various phases of projects
11. Pull reports on outstanding invoices (A/R)
12. Monitor team tasks and coordinate reminders – manage accountability across teams
13. Gantt charts – research, creation and staff training
14. Cull spreadsheets and consolidate data

TECH TASKS

1. Asana Setup, Cleanup and Organization
2. Docusign / Echosign tasks
3. Password management tools (we love LastPass!)
4. CRM configuration (we love Hubspot and Insightly!)
5. Eventbrite setup
6. HRIS setup (we love Bamboo!)
7. Set up Expensify to track expenses
8. Set up online course software (we love Kajabi!)
9. SurveyMonkey Tasks & Analytics Review
10. Set up Google forms for post-relationship surveys & send gift
11. Set up Doodle polls
12. Configure Asana integrations
13. Set up Zapier configurations between platforms
14. Set up delegate privileges in MS Outlook
15. Provide best practices around tech integrations
16. Zoom configuration

FINANCIAL

1. Set up and send client invoices
2. Schedule bill pay
3. Set up automated client billing
4. Calculate paychecks
5. Manage payroll entry
6. Expense reports
7. Weekly dashboard metrics updates
8. Loan option research
9. Receipt organization
10. Assist with merchant account setup
11. Process monthly payments to vendors
12. Set up recurring billing charges
13. Tech services pricing and billing spreadsheet
14. Submit timesheets for payment

TRAVEL

1. Research best pricing and book flights, hotels, cars
2. Manage logistics of getting documents and materials to conferences
3. Coordinate with event planner to arrange speaking opportunities
4. Develop materials for distribution at events
5. Create custom travel itineraries
6. Coordinate expense reports post-travel
7. Schedule limo pickups
8. Order matching t-shirts for family getaway
9. Book special events for family trips
10. Call airline to apply frequent flyer miles and/or credits
11. Manage travel changes or request refunds
12. Call Amex Travel to get better options on trip itinerary
13. Track down lost luggage
14. Research restaurant options for special diets on location

HR MANAGEMENT

1. Keep Accountability Chart current
2. Set up State of the Company presentation deck
3. Monitor license and CE credit expirations
4. Pre-screen and filter applicants
5. Employee survey setup and tracking
6. Order background checks
7. Add training videos to YouTube
8. Set up testing platform for new hires and monitor
9. Manage applicant tracking system
10. Order materials like new employee branded hardhats and vests
11. Personality and Kolbe Report generation
12. Organize certificate creation and distribution
13. Create a spreadsheet of all employee information and special dates
14. Organize electronic employee files
15. Research and configure Applicant Tracking Systems
16. Post jobs to relevant job sites
17. Organize and format employee handbook
18. Set up evaluation of staff and job descriptions to ensure Right People Right Seats

OFFICE MANAGEMENT

1. Format and proof documents
2. Create and file forms
3. Create fillable PDF files
4. Layout content in PowerPoint slide deck
5. Create mail merge files
6. Create a word file from an existing PDF
7. Clean up & merge contacts
8. Develop a quarterly marketing campaign template
9. Create a process template with screenshots for reference
10. Order Office Supplies
11. Client/team birthday gift orders
12. Client/team new baby gifts
13. New client welcome gifts
14. Order personal items for home, family, pets

PERSONAL

1. Sign the kids up for summer camp
2. Book massages
3. Research vacation options
4. Order catering for parties
5. Organize recipes in Evernote
6. Format labels for thank you cards
7. Set up IT Service Vendor Appointments
8. Schedule Doggy Day Care
9. Schedule Car Maintenance
10. Research doctor options
11. Manage online bill payments
12. Coordinate relocation/moves
13. Register kids for sports and add all dates to calendar, order supplies
14. Plan anniversary party and order venue and supplies
15. Improve systems for managing thank you notes and gifts
16. Research colleges, schedule tours
17. Research homeschool opportunities
18. Create online photo album for printing
19. Research theatre tickets and booking
20. Remind you of upcoming special dates and order flowers
21. Gatekeep calendar to protect Free Days
22. Online grocery orders
23. Nanny services
24. Make Dr. Appointments and submit insurance claims
25. Schedule hair and makeup appointment before speaking gig
26. Schedule mail and newspaper holds
27. Source jeweler

COMMUNICATION & SCHEDULING

1. Gatekeeper scheduling and time blocking
2. Creating an Ideal Week
3. Weekly Planning and Accountability Calls
4. Set up Voice Messaging tools
5. Client scheduling
6. Meeting reminders
7. Meeting confirmations
8. Board meeting prep
9. Schedule personal appointments
10. Coaching Log updates
11. Nurture client relationships through communication programs
12. Return calls from voicemail and redirect
13. Review meeting audios and create to-dos
14. Post-conference follow-up tasks/lead entry

SOCIAL MEDIA

1. Campaign execution using Hootsuite
2. Content sourcing and distribution
3. Platform optimization
4. Schedule content
5. Monitor analytics
6. Send LinkedIn Connect requests
7. Update Facebook header image
8. Monitor Google analytics for mentions
9. Update LinkedIn profiles and post articles
10. Repurpose content across platforms
11. Post blogs with links and add graphics
12. Create graphics through Canva
13. Monitor reporting on social media traffic (views)
14. Coordinate with social media team
15. Coordinate Podcasts or FB Live events

GET BACK TO FOCUSING ON WHAT YOU DO BEST

In Three Quick and Easy Steps

START NOW ›