You can't *buy back* time…

but you can *invest in support* to help you **free up more of it!**

Last year alone, we helped busy business owners get back over 8,000 hours of their time through our strategic delegation support program.

Here is a sampling of tasks they delegated to our team:

Marketing

1. Add email address in Mailchimp and Constant Contact
2. Configure email marketing campaigns in various tools
3. Coordinate with designer and team on new promo piece
4. Setup Eventbrite
5. Post articles to social media and blog
6. Manage Google Alerts
7. TinyURL creation for Twitter posts
8. Order new website domains
9. Manage affiliate program process
10. Research affiliates
11. Install social media plugins
12. Gather and monitor website analytics
13. Automate sales/ lead follow ups
14. Send workbooks and welcome kits to new clients
15. Infusionsoft campaign management

Research

1. Source and manage new vendors
2. Sales related contact sourcing and data mining
3. New tool research
4. Custom card creation research
5. Membership cancellation research
6. Video conferencing software solutions research
7. Find pricing on supplies
8. Research and order holiday gifts
9. Source new sites to advertise for new hires
10. Research travel / train/ plane hotel options
11. Research event insurance pricing
12. Identify industry leader contact info
13. Research summer camps
14. Find the best price on a printer/scanner/fax
15. Mine and submit for speaking opportunities

Email Management

1. Schedule on your behalf
2. Monitor your inbox while you're on vacation
3. Delegate your daily email management
4. Adding emails to your contact database
5. Press Release emails
6. Setup labels and filters
7. Turn emails into tasks in Asana
8. Delegating various emails to client team members on behalf of client
9. Unsubscribe you from spam
10. Setup Infusionsoft campaigns
11. Deploy drip emails
12. Create new accounts in GApps

Project Management & Reporting

1. Monthly membership reporting
2. Financial reporting
3. Warm lead phase reporting
4. Expense Reporting
5. Operational dashboard updates
6. Monitor survey responses and create a spreadsheet
7. Manage trademark registration process
8. Bid form Completion
9. Manage external vendors and teams to complete large-scale projects
10. Map out due dates of various phases of projects

delegate*

Start Delegating Today!

DelegateSolutions.com

For More Information:
Info@DelegateSolutions.com
814.367.3827

Program Set up /Tasks

1. Asana Deployment
2. Adobe Connect Set Up
3. Docusign / Echosign tasks
4. Morningstar Tasks
5. Lastpass implementation
6. Insightly configuration
7. Eventbrite setup
8. MBTI Report generation
9. Update, Organize and Maintain Basecamp Projects
10. Implementing MS Lync software with team members
11. SurveyMonkey Tasks
12. Gantt charts for Basecamp and Asana – research, creation and staff training
13. Surveymonkey Analysis
14. Configure Asana integrations
15. Setup Zapier configurations between platforms
16. Setup delegate privileges in MS Outlook

Financial

1. Setup and send client invoices
2. Schedule bill pay
3. Setup automated client billing
4. Calculate paychecks
5. Reconcile Quickbooks
6. Expense reports
7. Weekly dashboard metrics updates
8. Loan option research
9. Receipt organization
10. Assist with merchant account setup
13. Process monthly payments to vendors
14. Setup recurring billing charges

Travel

1. Research 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 time with Mickey and Cinderella in Disney
10. Call airline to apply frequent flyer miles
11. Call Amex Travel to get better options on trip itinerary
12. Track down lost luggage

HR Management

1. Process mapping
2. Identify tasks that can be handled by remote support
3. Monitor license and CE credit expirations
4. Create process templates
5. Pre-screen resume review and filing
6. Employee survey setup
7. Order background checks
8. Add training videos to YouTube
9. Setup testing platform for new hires
10. Monitor completion of new hire testing
11. Manage applicant tracking
12. Order materials like new employee branded hardhats and vests

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 Macros to work inside of Word
6. Create mail merge files
7. Create a word file from an existing PDF
8. Clean up & merge contacts
9. Develop a quarterly marketing campaign template
10. Create a process template with screenshots for reference
11. Ordering Office Supplies
12. Client birthday gift orders
13. Client new 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 party
5. Organizing recipes in Evernote
3. Labels for Christmas cards
4. Setup IT Services
5. Schedule Doggy Day Care
6. Schedule Car Maintenance
7. Research doctor options
8. Manage online bill payments
9. Coordinate relocation/ moves
10. Register kids for sports and add all dates to calendar, order supplies
12. Plan anniversary party and order venue and supplies
13. Submitting resumes to various open jobs
14. Improving systems for managing thank you notes and gifts
15. Research colleges, schedule tours

Communication & Scheduling

1. Setup Voxer as a communication tool
2. Client scheduling
3. Meeting reminders
4. Meeting confirmations
5. Handwritten notes
6. Board meeting prep
7. Scheduling personal appointments
8. Coaching Log updates
9. Nurturing client relationships through communication programs
10. Return calls from voicemail and redirect
11. Dictations
12. Post-conference follow up tasks / lead entry

Social Media

1. Campaign strategy and maintenance
2. Content sourcing and distribution
3. Platform optimization
4. Schedule content
5. Monitor analytics
6. Manage Facebook ads
7. Reputation management
8. Send LinkedIn Connect requests
9. Update Facebook header image
10. Create conversion tracking code for website
11. Monitor Google analytics
12. Develop LinkedIn profiles
13. Design custom graphics
14. Repurpose content across platforms
15. Post blogs

DELEGATE IT!

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