

FREE GUIDE

**Business
Support
Services**
Caroline Torres



The Ultimate Delegation Guide.

**100+ tasks you could hand
over to a Virtual Assistant.**



**Free up your time to focus on
running and growing your business**

Do you really need to do it all?

When you run a business, you often end up wearing far too many hats.

You might start your day answering emails, spend lunch chasing an unpaid invoice, update your website in the afternoon, and then realise at 5pm that you still haven't touched the actual client work you planned to do.

Sound familiar?

The reality is that **you don't have to do everything yourself.**

Delegating doesn't mean giving up control. It's about choosing where your time is most valuable and handing over the tasks that don't have to be done by you.

This guide outlines **over 100 practical tasks** across administration, business support, marketing, digital systems, and events that you could delegate so you can focus on your clients and grow your business.

A quick challenge before you start...

As you work through the guide, mark every task you currently do yourself. Your total at the end may surprise you.



Inbox and Email Support

1. Organise your inbox and maintaining it on an ongoing basis.
2. Creating and managing email folders, labels, and tags.
3. Clearing old, archived, and unnecessary emails.
4. Managing spam, blocking suspicious senders, and reporting phishing attempts.
5. Flagging and prioritising important incoming messages.
6. Responding to routine enquiries and managing general business enquiries.
7. Following up on unanswered emails and tracking pending replies.
8. Managing out-of-office auto-responses.
9. Creating, updating, and using email templates for common queries.
10. Setting up automated filters, routing rules, and sweep rules to sort incoming mail automatically.
11. Unsubscribing from irrelevant newsletters and maintaining mailing list hygiene.
12. Saving email attachments and receipts to cloud storage (e.g., Google Drive, OneDrive).
13. Converting actionable emails into task management items (e.g., Asana, Trello).



Diary, Meetings & Travel

14. Scheduling appointments.
15. Arranging meetings.
16. Coordinating meeting dates across multiple attendees.
17. Sending meeting details and location/link updates.
18. Updating your diary.
19. Keeping track of upcoming appointments.
20. Preparing background information ahead of meetings.
21. Taking meeting notes.
22. Preparing meeting minutes.
23. Following up on action points.
24. Setting up and managing automated booking links (e.g., Calendly, Acuity).
25. Planning travel logistics: booking flights, trains, rental cars, and hotels.
26. Creating detailed travel itineraries.
27. Managing international time zones.



Files, Documents & CRM

- 28. Organising digital and physical files.
- 29. Creating logical folder structures.
- 30. Tidying existing filing systems.
- 31. Renaming and filing documents consistently.
- 32. Entering customer information into your CRM.
- 33. Updating existing customer records.
- 34. Removing duplicate CRM records.
- 35. Deleting outdated data.
- 36. Keeping your customer database accurate and up to date.
- 37. Managing cloud storage permissions, folder access, and file-sharing settings (e.g., Google Drive, Dropbox).
- 38. Setting up automated folder backups for critical business files.
- 39. Archiving or securely removing obsolete client data in line with agreed data retention and GDPR procedures.



General Business Administration

- 40. Typing letters and preparing reports.
- 41. Creating spreadsheets.
- 42. Formatting business documents.
- 43. Updating existing documents.
- 44. Creating reusable document templates.
- 45. Preparing meeting paperwork.
- 46. Creating document packs.
- 47. Writing and formatting tender documents.
- 48. Following up on outstanding actions and keeping business information organised.
- 49. Creating Standard Operating Procedures (SOPs) and documenting core business processes.
- 50. Conducting desktop research for products, services, tools, or potential suppliers.
- 51. Managing software subscriptions, user access logins, and annual license renewals.
- 52. Performing data entry and cleaning datasets across core software tools.
- 53. Logging and organising receipts and expenses.
- 54. Monitoring outstanding invoices.
- 55. Sending payment reminders and following up on overdue invoices.
- 56. Categorising transactions within bookkeeping software



Marketing Planning & Strategy

- 57. Helping develop a marketing plan and supporting the marketing strategy.
- 58. Creating a brand voice document.
- 59. Planning marketing activities in advance.
- 60. Organising marketing campaigns.
- 61. Creating marketing schedules.
- 62. Coordinating activity across different channels.
- 63. Researching ideas for future marketing content.
- 64. Organising existing marketing materials and maintaining consistent activity.
- 65. Conducting competitor research and monitoring industry updates/trends.
- 66. Researching and coordinating partnership, collaboration, podcast and speaking opportunities.
- 67. Tracking and compiling monthly marketing performance metrics into clean reports.



Social Media Management

- 68. Developing social media and content strategy.
- 69. Setting up business profiles on Facebook, Instagram, and LinkedIn.
- 70. Optimising existing social media profiles.
- 71. Planning social content.
- 72. Creating content calendars
- 73. Writing bespoke social media posts across all channels.
- 74. Creating branded social media graphics using tools like Canva and Adobe.
- 75. Scheduling social media content and maintaining a consistent posting schedule.
- 76. Managing online communities by responding to comments, direct messages (DMs), and mentions.
- 77. Repurposing long-form content (blogs, podcasts) into social graphics, carousels, or short clips.
- 78. Researching relevant keywords, hashtags and social search opportunities to improve content visibility.



Website & Digital Support

- 79. Building simple templated websites (Wix, GoDaddy, Squarespace, IONOS).
- 80. Uploading content to an existing WordPress website.
- 81. Editing website text, updating images, and formatting existing website pages.
- 82. Keeping website content fresh and relevant.
- 83. Monitoring websites for broken links (404 errors) and fixing dead links.
- 84. Applying basic on-page SEO updates (meta descriptions, image ALT text, page headings).
- 85. Setting up and updating Google Business Profile listings.
- 86. Supporting the setup and ongoing management of Google Analytics.



Design & Email Marketing

- 87. Creating flyers, designing brochures, and business cards.
- 88. Writing, designing and scheduling newsletters.
- 89. Creating professional slide presentations.
- 90. Creating downloadable guides, workbooks, and infographics.
- 91. Designing email marketing campaigns.
- 92. Creating email marketing landing pages.
- 93. Supporting opt-out forms and CRM email integrations.
- 94. Setting up automated email welcome series.
- 95. Designing slide decks for pitch presentations, workshops, or client proposals.
- 96. Converting plain documents into interactive, fillable PDF formats.



Events & Webinars

- 97. Researching event venues, suppliers, and vendors.
- 98. Creating event budgets.
- 99. Developing timelines, deadlines and project plans.
- 100. Coordinating guest lists, sending invitations, and tracking RSVPs.
- 101. Supporting ticketing platforms and event sign-up systems.
- 102. Creating event marketing materials.
- 103. Promoting the event through social media if required.
- 104. Coordinating event logistics, i.e., A/V, transport, accommodation, permits and supplies.
- 105. Providing on-the-day event support and managing post-event follow-ups, thank-you notes, and feedback.
- 106. Setting up and managing virtual event platforms (e.g., Zoom Webinars, Microsoft Teams).
- 107. Managing event registration systems (e.g., Eventbrite).
- 108. Preparing physical delegate welcome packs, name badges, and signage.



How many are you doing yourself?

Count the tasks you marked across all sections. What does your number tell you?

1 - 20 Tasks

You have a good handle on your workload, but occasional support during particularly busy periods could help you protect your time.

21 - 50 Tasks

You're managing a lot behind the scenes. Delegating a few regular admin or marketing tasks could give you valuable time back each month.

51 - 90 Tasks

A significant number of day-to-day tasks are on your plate. This may be a good time to identify which ones genuinely need your attention and which could be handed over.

90+ Tasks

You're carrying a substantial amount of the operational workload yourself. Delegating even a small proportion could create more space to focus on clients, growth and the work only you can do.

Choose five tasks you would happily hand over tomorrow.

Those five tasks are your starting point.



What could you do with that time?

Delegating isn't simply about getting jobs off your desk.

It's about reclaiming space for the work that actually moves your business forward.

Handing over administrative, digital, and marketing tasks gives you the freedom to focus on:

- ✓ **Growing your income:** Spending more time with high-value clients, delivering exceptional work, and winning new contracts.
- ✓ **Developing your business:** Working on strategy, building new services, attending key networking events, or getting out on site.
- ✓ **Restoring balance:** Reclaiming your evenings and weekends, reducing the pressure of the day-to-day, and finishing your working day at a reasonable time.

The goal isn't to hand over your whole business. It's about **identifying the repetitive, time-consuming tasks** someone else can take care of so you can concentrate on the things only you can do.

Your time is your most valuable asset.

Use it where it makes the biggest impact.



Ready to lighten your workload?

You don't have to tackle the whole list at once.

Whether you need a few hours of regular admin support, ongoing marketing assistance, a specific project tackled, or flexible cover, support can be shaped around what your business actually needs.

Your Next Steps:

1. Look back over the guide and pick the five tasks causing you the most frustration right now.
2. Get in touch for a quick, informal chat to explore how to take those tasks off your plate.

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Start with those five tasks

Get in touch for an informal chat

Let's figure out the rest