197 Tasks You Can Outsource to Virtual Assistants

GENERAL ADMIN	DOING NOW	WANT TO DO	N/A
Email & Schedule Management Tasks			
1. Filtering Email Inbox / Deleting Spam	☐	☐	☐
2. Importing Database	☐	☐	☐
3. Updating Contacts or CRM	☐	☐	☐
4. Answering Customer Service Emails/Tickets/ Chat Support	☐	☐	☐
5. Calendar Management	☐	☐	☐
6. Appointment Scheduling	☐	☐	☐
7. Travel Arrangements and Planning	☐	☐	☐
File Storage & Organization Tasks			
8. Dropbox/Google Drive Organization	☐	☐	☐
9. Data Entry in Word or Google Docs	☐	☐	☐
10. Creating/Managing Spreadsheets	☐	☐	☐
11. Preparing PowerPoint/Keynote Presentations	☐	☐	☐
12. PDF Conversion, Splitting and Merging	☐	☐	☐

GENERAL ADMIN	DOING NOW	WANT TO DO	N/A
13. Maintenance of client databases and creation of files	☐	☐	☐
General Administrative Tasks			
14. Assist with management reporting on a monthly basis or as required	☐	☐	☐
15. Sales support (E.g., Assist with client appointment booking, research into client, recommendations, quoting, processing, and filing and preparing client documents).	☐	☐	☐
16. Processing applications, renewals or changes to existing client records	☐	☐	☐
17. Ensuring regulatory compliance	☐	☐	☐
18. Liaising with fund managers, administrators and life companies regarding client affairs	☐	☐	☐
19. Client service (E.g., attend to client query and request	☐	☐	☐

197 Tasks You Can Outsource to Virtual Assistants

GENERAL ADMIN	DOING NOW	WANT TO DO	N/A
Administrative & Blogging Tasks			
20. Transcription of Audio and Video Files			
21. Simple eBook Layout/Formatting			
22. Preparing Online Meeting Minutes			
23. Report Creation			
24. Forms Creation			
25. Document Template Creation			
26. Online Research (Statistics, Content, Facts, Completion)			
27. Data Mining and Development / Lead Generation			
28. Blog Publishing Management			
29. Moderating Blog Comments (Approve/ Disapprove/Replying)			
30. Adding Tags and Images to Blog Posts			
31. Receptionist Duties			
32. Voicemail Checking			
33. Sending Client Invoices			

GENERAL ADMIN	DOING NOW	WANT TO DO	N/A
34. Basic Bookkeeping			
35. Personal Errands (Purchasing Gifts Online, etc.)			
Customer Service/Reception			
36. Managing incoming calls and customer service inquiries			
37. Generating sales leads that develop into new customers			
38. Answering product and service questions			
39. Handle customer complaints			
40. Keep records of customer interactions			
41. Process customer accounts and file documents			
Project Management & Training Tasks			
42. Project Management Between You and Team Members			
43. Preparation of Training Content			
44. Induction and Training of New Virtual Staff			
45. Deadline / Deliverables Tracking			

197 Tasks You Can Outsource to Virtual Assistants

DIGITAL MARKETING	DOING NOW	WANT TO DO	N/A
Social Media Management Tasks			
46. Creating Facebook Fan Pages/Groups			
47. Posting and Scheduling Facebook Status Updates			
48. Managing Facebook Comments and Messages			
49. Create and Manage Company Twitter Account			
50. Create and Manage LinkedIn Account/Profile			
51. Create and Manage YouTube Account			
52. Upload Videos on YouTube & Publish			
53. Moderating YouTube Comments			
54. Uploading Videos to other Video Sharing Sites / Social Media			
55. Answer inquiries and Messages on All Channels & Profiles			

DIGITAL MARKETING	DOING NOW	WANT TO DO	N/A
Content Writing			
56. Content/Blog Post Creation			
57. Guest Blogging/Ghost Blogging			
58. Newsletter Writing			
Photo & Video Editing			
59. Basic Editing of Audio Files (Trimming, Adding captions)			
60. Removing Background Noise from Audio and Video			
61. Adding Intros and Outros to Videos			
62. Basic Photoshop/Image Editing (Not Graphic Design)			
Graphic and Web Design			
63. Designing Logos, banners, Icons, eBook Covers and Headers			
64. Designing Infographic Images (Content Provided)			

197 Tasks You Can Outsource to Virtual Assistants

DIGITAL MARKETING	DOING NOW	WANT TO DO	N/A
65. Designing Websites, Creating Mock-up	☐	☐	☐
66. Designing Brochure	☐	☐	☐
67. Designing Social Media Banners and Posters	☐	☐	☐
Web Development			
68. Support and Develop WordPress Websites	☐	☐	☐
69. Install WordPress Plugins and Themes	☐	☐	☐
70. WordPress Theme Customization	☐	☐	☐
71. Social Media Integration	☐	☐	☐
72. Site Maintenance/Content Updates	☐	☐	☐
73. Payment Gateway Integration	☐	☐	☐
74. Blog Posting	☐	☐	☐
75. Website Statistic Tracking	☐	☐	☐

DIGITAL MARKETING	DOING NOW	WANT TO DO	N/A
Email Marketing			
76. Creating a New List in Email Marketing Software (MailChimp)	☐	☐	☐
77. Adding/Removing Subscribers from Lists	☐	☐	☐
78. Creating and Scheduling Broadcast Emails to Promote Content	☐	☐	☐
79. Editing Follow-up emails/Auto Responders	☐	☐	☐
80. Creating Email Newsletters	☐	☐	☐
81. Creating Sign-up Forms	☐	☐	☐
82. Editing/Proofreading Emails	☐	☐	☐
83. Generating/Analyzing Newsletter Reports	☐	☐	☐

197 Tasks You Can Outsource to Virtual Assistants

FINANCIAL PLANNING	DOING NOW	WANT TO DO	N/A
Paraplanning			
84. Update client paper and electronic files			
85. Completing, checking, submitting and processing application forms			
86. Prepare and update Statement of Advice documents and templates			
87. Prepare Record of Advice documents			
88. Enter client data into financial planning software			
89. Liaising with fund managers, administrators and life companies regarding client's financial situation			
90. Completing fact find documents			
91. Assist with research into client recommendations			
92. Monitoring stationary, ensuring always-sufficient supply and not out of date			

FINANCIAL PLANNING	DOING NOW	WANT TO DO	N/A
Underwriting			
93. Sales support (E.g., contacting clients for outstanding underwriting or admin requirements, contacting insurers when changes need to be done on the application (name incorrectly spelled, DOB, address, etc.), making sure policies go in to force as soon as possible			
94. Ensure regulatory compliance of Sales Paraplanners and Advisers			
95. Review and submit application			
96. Verify all documents are completed/signed fully and correctly			
97. Client appointment scheduling			
98. Manage medical requirements			
99. Organize/follow up on any outstanding requirements (e.g. financial documents, superfund details, rollover forms) if applicable			

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197 Tasks You Can Outsource to Virtual Assistants

QUALITY ASSURANCE	DOING NOW	WANT TO DO	N/A
100. Draft quality assurance policies and procedures	☐	☐	☐
101. Interpret and implement quality assurance standards	☐	☐	☐
102. Evaluate adequacy of quality assurance standards	☐	☐	☐
103. Devise sampling procedures and directions for recording and reporting quality data	☐	☐	☐
104. Review the implementation and efficiency of quality and inspection systems	☐	☐	☐
105. Plan, conduct, monitor testing, and inspection of materials and products to ensure finished product quality	☐	☐	☐
106. Document internal audits and other quality assurance activities	☐	☐	☐
107. Investigate customer complaints and non-conformance issues	☐	☐	☐

QUALITY ASSURANCE	DOING NOW	WANT TO DO	N/A
108. Collect and compile statistical quality data	☐	☐	☐
109. Analyze data to identify areas for improvement in the quality system	☐	☐	☐
110. Develop, recommend and monitor corrective and preventive actions	☐	☐	☐
111. Prepare reports to communicate outcomes of quality activities	☐	☐	☐
112. Identify training needs and organize training interventions to meet quality standards	☐	☐	☐
113. Evaluate audit findings and implement appropriate corrective actions	☐	☐	☐
114. Monitor risk management activities	☐	☐	☐
115. Managing document systems	☐	☐	☐
116. Assure ongoing compliance with quality and industry regulatory requirements	☐	☐	☐

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FINANCE SUPPORT	DOING NOW	WANT TO DO	N/A
117. Process and prepare financial and business forms for the purpose of checking account balances			
118. Perform routine calculations to produce analyses and reports			
119. Create, send, and follow up on invoices			
120. Review and adhere to department budgets			
121. Collect and enter data for various financial spreadsheets			
122. Review and audit financial statements and reports, ensure all calculations and data entries are correct			
123. Reconcile any discrepancies or errors identified by conversing with clients			
124. Assist in creating financial reports on a regular basis			
125. Adhere to the company's or organization's financial policies and procedures			
126 Answers questions and provide assistance to customers and clients as needed			
127. Suggest changes or improvements to increase accuracy, efficiency, and cost reductions			

MORTGAGE SUPPORT	DOING NOW	WANT TO DO	N/A
128. Respond to written and phone inquiries from members, possibly title companies, and internal personnel regarding loans			
129. Answer questions pertaining to loan servicing including payment research, taxes, insurance, payoffs, adjustable rate loans			
130. Maintain completed mortgage files after funding			
131. Work with Support Services to ensure payments are posted correctly and provide support			
132. Maintain, manage and track all pending/outstanding loan documents and exceptions			
133. Perform administrative tasks to support the mortgage department			

INSURANCE BROKING	DOING NOW	WANT TO DO	N/A
134. Ensure that clients understand the terms and the extent of the cover provided in line with industry regulations			
135. Foresee clients' insurance needs, such as policy amendments			
136. Manage client's lapse payments and dishonor status. Reminding clients on their payment due			

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INSURANCE BROKING	DOING NOW	WANT TO DO	N/A
137. Advise clients on whether and when they need to make a claim on their policies			
138. Build and maintain ongoing relationships with clients			
139. Lead generation, acquiring new clients and win accounts against competitors			
140. Keep detailed records and complete administrative tasks such as paperwork and correspondence			
141. Keep up with changes in the insurance market and in clients' industries			

SELF-MANAGED SUPERFUND	DOING NOW	WANT TO DO	N/A
Advice Preparation			
142. Call existing super funds to collect required information			
143. Prepare the SoA and rollover paperwork			
144. Enter the information into ClearDocs to prepare the required documentation (trust deed, binding nominations, etc.)			

SELF-MANAGED SUPERFUND	DOING NOW	WANT TO DO	N/A
145. Collate the documentation, review it for accuracy, provide to adviser or client via soft copy			
146. Prepare the investment strategy using the client's Risk Profile			
Implementation			
147. Standard rollover and insurance processes			
148. Implement required trades etc.			
149. Provide updates to other advisers as necessary			
150. Email compliance information (trustee responsibilities, etc., maybe a video from the adviser explaining SMSFs)			
Ongoing			
151. Portfolio reviews (collect data, track to Investment Strategy and Risk Profile)			
152. Insurance reviews			
153. Contribution tracking			
154. Providing information to administrator/accountant as required			

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INSURANCE RETENTION	DOING NOW	WANT TO DO	N/A
155. Verify status with insurer and liaise with clients regarding the dishonor/overdue notice and arrange alternative payment details if needed			
156. Assist clients in setting up or updating Direct Debit Requests (DDR)			
157. Keep track of the credit card expiry date and ensure details are updated by the first Monday of the month of expiry			
158. Prepare list of policies renewing a month in advance			
159. Update renewal figures			
160. Send clients the review offer email			
161. Identify possible opportunities which include generating and providing a market comparison to the client			
162. Set review appointments with the adviser			

INSURANCE RETENTION	DOING NOW	WANT TO DO	N/A
163. Process administrative tasks for post-review appointments			
164. Maintain contact with enrolled clients at varying stages throughout the year. Sending emails about claims awareness, birthday greeting, and other issues that might concern them and their insurances			
165. Respond to client queries via email and call in a timely manner			
166. Check websites for online notifications such as AMP & One Path			
167. Probing when client requests for cancellation - maybe policy can be reduced instead of cancelled or switched to another provider & offer to set appointment with adviser for review			
168. Call clients offering policies they do not have such as trauma insurance or income protection			

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FINANCIAL PLANNING RETENTION	DOING NOW	WANT TO DO	N/A
169. Proactively maintain contact with enrolled clients at varying stages throughout the year. Sending emails about claims awareness, birthday greeting, and other issues that might concern them and their investments and superannuation			
170. Contact clients before 30 June each year to discuss superannuation contribution options			
171. Activate clients that have been dormant for some time			
Mortgage Retention			
172. Proactively maintain contact with enrolled clients at varying stages throughout the year. Sending emails about claims awareness, birthday greeting, and other issues or concerns on their mortgages			
Other Desirable Skills			
173. Recruit other virtual team member			

HR ADMIN	DOING NOW	WANT TO DO	N/A
174. Write a detailed job description			
175. Post vacancy positions online			
176. Monitor the status of online vacancy posts			
177. Screen candidate CVs/resumes			
178. Preform background checks on applicants			
179. Call applications			
180. Set initial online interviews to measure how apt the candidate is for the role			
181. Organize the onboarding schedule for new hires			
182. 182. Give new hires information about the structure of the organization			
183. Compile, update, manage and secure employee database containing all the necessary employee files and records			
184. Provide mentoring to new hires in the first few weeks			

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HR ADMIN	DOING NOW	WANT TO DO	N/A
185. Create and update systems documents related to the procedures and policies of the company			
186. 186. Set up a payroll system			
187. Set up tracking systems			
188. Prepare reports for employee activities			
189. Write and prepare training material			
190. Ensure smooth communication between the company and the employees			
191. Research skills necessary to fill an open position and include it in job postings			
192. Plan virtual team building activities			
193. Ensure that each employee is recognized for good work			

HR ADMIN	DOING NOW	WANT TO DO	N/A
194. Ensure birthdays and holidays are acknowledged			
195. Can research development plans			
196. Contribute to staffing plans			
197. Respond to any complaints about the workplace from employees			

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Got any questions? Contact us at service@vaplatinum.com.au