

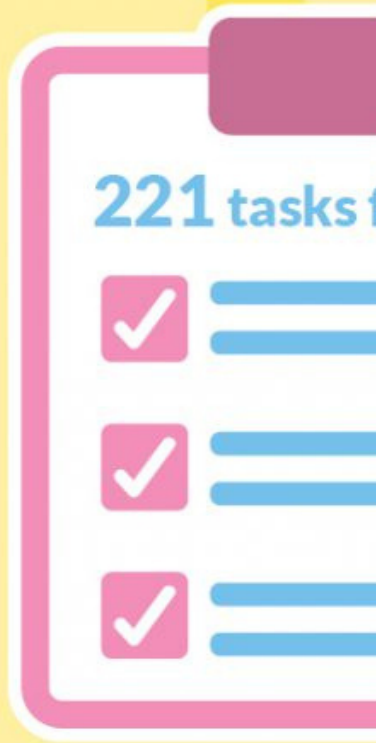


220

**TASKS YOU CAN
ASSIGN TO A
VIRTUAL ASSISTANT**



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221 TASKS YOU CAN ASSIGN TO A VIRTUAL ASSISTANT

With a Virtual Assistant on your team, you can outsource repetitive tasks, boring tasks, and tasks that fall outside your expertise. Ultimately, you have more time to focus on your core priorities and build your business.

Yet how many tasks can you realistically delegate and how much time can you reclaim? The answer may surprise you. Virtual Assistants can take on the work of a multitude of in-person positions – and at a much lower price point.

Our handy checklist gives you 221 tasks a VA can complete – so you don't have to add another desk to the office, advertise for a new position, or give up your weekend figuring out how to do something you never wanted to do in the first place.

What can you take off of your to-do list today?



ADMINISTRATION

A general Administrative VA keeps your business running smoothly while saving you time. You get more time to focus on what you do best.

An Executive Virtual Assistant is a trusted assistant and advisor supporting business organization and strategy. A VA in this role develops a deep knowledge of your business. In addition to general administrative tasks, they can help with everything from business systems and staff management to report preparation.

A Personal Virtual Assistant is 100% dedicated to making your day go smoothly. They give you superpowers to be the person who always remembers every birthday, celebrates every anniversary, and “does it all” without actually doing it all yourself. If you’ve ever wanted to send a thank-you gift, schedule a routine appointment or take a vacation, but couldn’t find the time to make it happen, a personal assistant will change your life.

Administrative VA tasks:

General

- 1. Email inbox management
- 2. Manage files and documents
- 3. Data Entry
- 4. Preparing presentation slides and documents
- 5. Update your CRM
- 6. Answer emails
- 7. Check voicemail
- 8. Booking interviews for research
- 9. Book podcasts
- 10. Book speaking engagements
- 11. Set up and organize digital filing systems
- 12. Create and update spreadsheets

Executive Assistant

- 13. Plan, schedule, and manage meetings
- 14. Attend meetings on your behalf
- 15. Research data and prepare reports
- 16. Prepare Quarterly and Annual presentations and documents
- 17. Project management
- 18. Team management
- 19. Evaluate and update systems and processes
- 20. Answer and screen your phone calls and return calls on your behalf
- 21. Calendar management
- 22. Event planning: from venues and caterers to invitations and seating charts
- 23. Travel planning: flight plans, accommodations, ground transport, and meetings



ADMINISTRATION

Administrative VA tasks:

Personal Assistant

- 24. Send and receive personal emails
- 25. Manage your personal calendar
- 26. Schedule personal appointments
- 27. Organize and prepare for meetings
- 28. Prepare documents and presentations
- 29. Organize online documents
- 30. Bill payment/expense tracking
- 31. Answer, screen, and return phone calls on your behalf
- 32. Book flights, hotels, and rental cars
- 33. Send flowers, cards and gifts
- 34. Order meals/coffee online





BOOKKEEPING

Numbers are a fact of life. Love them, hate them, we all have to crunch them. A Bookkeeping and Finance Virtual Assistant takes care of the numbers you have to track and report. You're prepared and organized for bills, taxes, and quarterly reports. Your VA has it handled.

Bookkeeping and Finance VA tasks:

- 35. Setting up and managing bookkeeping and accounting software
- 36. Record payments
- 37. Reconcile account statements
- 38. Bill Payment
- 39. Prepare and send invoices
- 40. Send payment reminders
- 41. Send late payment reminders
- 42. Collect overdue payments
- 43. Send payment receipts
- 44. Track expenses
- 45. Reporting
- 46. Prepare Profit and Loss statements
- 47. Balance sheet preparation
- 48. Yearly and quarterly reports
- 49. Organize records for taxes
- 50. Sales loss reporting
- 51. Property value reports
- 52. Financial data entry
- 53. Collect and file paperwork for taxes
- 54. Procure documents and signatures



DIGITAL MARKETING & SOCIAL MEDIA

Don't need the full services of a Digital Marketing agency? Want to post more on social but don't have the time? A Digital Marketing VA is the affordable answer for growing businesses. You can hire only the help you need and steer your own course with the assistance of your own team of experienced professionals.

Digital Marketing VA tasks:

General

- 55. Setting up custom events with Google Tag Manager
- 56. Setting up Google Analytics
- 57. Creating reputation management reports
- 58. Booking interviews for customer research
- 59. Running online and print ad campaigns
- 60. Tracking ad campaign performance
- 61. Managing registrations for events

Social Channels

- 62. Managing social media ad campaigns and audiences
- 63. Commenting on other blogs
- 64. Commenting on social posts
- 65. Managing follows and followers on social media
- 66. Sending birthday and anniversary greetings on Social Media
- 67. Creating and scheduling Social media posts
- 68. Creating content to share on social
- 69. Organizing social images online
- 70. Curating quotes and other content to share on social

YouTube

- 71. Creating and setting up a YouTube channel
- 72. Optimizing YouTube videos for search
- 73. Monitoring and responding to YouTube comments
- 74. Design fliers and mailers
- 75. Create brochures
- 76. Designing creative assets for your channel and videos
- 77. Social media management



DIGITAL MARKETING & SOCIAL MEDIA

Digital Marketing VA tasks:

Email

- 78. Cleaning email lists
- 79. Creating and setting up newsletters
- 80. Creating groups and segments
- 81. Setting up auto-responders
- 82. Preparing email performance reports
- 83. Responding to new subscribers

Graphic Design

- 84. Logo Design
- 85. Favicon Design
- 86. Create graphics for social media posts
- 87. Design ad creatives
- 88. Create blog post illustrations
- 89. Design/wireframe websites
- 90. Design/wireframe landing pages
- 91. Design/wireframe sales pages
- 92. Format Newsletters
- 93. Design publicity fliers and posters for events



CONTENT CREATION

“Content is king” in digital marketing, according to Bill Gates’ famous 1996 essay. Yet who has time to write it all? You can get help for your blog, build a Knowledge Base, or get those podcast and YouTube episodes launched and published faster with a Digital Marketing VA on your team.

Content Creation VA tasks:

Writing and Editing

- 94. Writing Knowledge Base Articles
- 95. Migrating existing content to your tawk.to Knowledge Base
- 96. Monitoring customer feedback for Knowledge Base articles
- 97. Creating internal newsletters
- 98. Proofread documents
- 99. Proofreading emails

Video

- 100. Video editing
- 101. Adding descriptions and credits to videos
- 102. Creating and adding video bumpers
- 103. Adding alt text to images in emails and newsletters
- 104. Adding video cards on YouTube
- 105. Managing YouTube playlists

Podcast support

- 106. Audio editing
- 107. Inviting new podcast guests
- 108. Audio transcription of podcast episodes
- 109. Editing podcast transcripts
- 110. Creating and publishing podcast summaries
- 111. Setting up podcasts on third-party platforms
- 112. Podcast episode distribution
- 113. Booking podcasts
- 114. Creating podcast previews with audiograms
- 115. Creating promos for new episodes
- 116. Sending thank you emails to podcast guests

Blogging

- 117. Blogger/Content Writer
- 118. SEO keyword research for new blog posts
- 119. Competitor keyword analysis
- 120. Creating title tags and other metadata for blog posts
- 121. Refreshing/updating old blog posts/content
- 122. Research for new articles or blog posts
- 123. Responding to blog comments



EDUCATIONAL SERVICES

Experienced course creators know it takes a small village to bring all the parts of a new course or conference together into a polished product. Then, you have to sell it. For deadline-based educational projects, hiring a VA – or a team of VAs – on an hourly basis can help you prepare for launch day and beyond.

Education VA tasks:

- 124. Creating tutorial videos
- 125. Adding content to e-courses
- 126. Moderating a course forum
- 127. Taking course registrations



CHAT AND TICKETING SUPPORT

Missed chats are missed opportunities and a VA can be there in real-time to answer questions and follow up with ticketing. A Virtual Assistant can set up your widget and ticketing emails for you, so you can see your communications in one place. Your VA can also customize your widget for your brand, set up canned “shortcut” message templates, create automated trigger messages, and more!

Customer Support VA tasks:

- 128. Adding tags to chats and messaging
- 129. Assisting at the information booth for virtual conferences
- 130. Creating Shortcut templates for use in chat and ticketing emails
- 131. Creating Trigger automations
- 132. Customizing a chat widget for your brand
- 133. Setting up resource tabs in your task.to dashboard



HEALTH SERVICES

A Health Services Virtual Assistant keeps your office organized, responsive, and running smoothly. In addition to performing administrative tasks, a VA specializing in health and medical services can work with insurance carriers, perform medical transcription, and manage patient records and appointments at any hour of the day.

Health Services VA tasks:

- 134. Data entry for Electronic Medical Records
- 135. Data entry for Electronic Health Records
- 136. Transcribe dictations
- 137. Pre-certify visits and procedures
- 138. File insurance claims
- 139. Check patient eligibility for benefits
- 140. Manage billing, coding and collections
- 141. Send new patient intake forms
- 142. Take patient messages
- 143. Schedule and manage appointments
- 144. Appointment confirmations
- 145. Update records and notes in patient charts



HUMAN RESOURCES

Finding and keeping the right people on your team takes time and expertise. For businesses without an in-house HR department, a Virtual Assistant specializing in HR can bring you the expert help you need to build your organization – without relying on an outside agency.

Human Resources VA tasks:

- 146. Manage payroll
- 147. Recruit and screen new team members
- 148. Train new Virtual Assistants
- 149. Post internal announcements and celebrations
- 150. Monitor response times and customer satisfaction for chat agents



REAL ESTATE

A Real Estate Virtual Assistant will keep your listings up to date and ensure you're on track to meet all the many deadlines and appointments that come with buying and selling property. Real estate businesses also benefit from working with Administrative VAs, Executive and Personal VAs, Bookkeeping VAs, and Digital Marketing VA to support marketing, advertising, relationship-building, and more.

Real Estate VA tasks:

- 151. Setting appointments for home tours
- 152. Booking home inspections
- 153. Designing open house fliers and posters
- 154. Designing postcards and mailers for current and recently sold properties
- 155. Responding to new inquiries
- 156. Sales and marketing brochures for neighborhood campaigns
- 157. Making outbound calls to legal, inspection, and lending services
- 158. Updating new buyers and sellers in your CRM
- 159. Live chat customer support
- 160. Property value reports
- 161. Creating and updating MLS listings
- 162. Video editing for home walk-throughs
- 163. Updating new listings and featured properties on your website
- 164. Send hospitality gifts to new homeowners



SALES

Whether you're warm-calling leads or building an e-commerce empire, a VA can help you do it better and faster. Here are just a few of the tasks you can assign to Sales and E-commerce VAs.

Sales and E-commerce VA tasks:

Sales Teams

- 165. Telemarketing
- 166. Sending reports and updates to clients
- 167. Booking product demos and walkthroughs
- 168. Creating and conducting customer surveys
- 169. Lead generation
- 170. Lead screening and qualification
- 171. Client Follow-up
- 172. Setting sales presentation appointments
- 173. Tracking incoming service orders
- 174. Responding to reviews on third-party sites
- 175. Outbound prospecting calls

E-commerce

- 176. Placing and updating orders
- 177. Order tracking
- 178. Handling product returns and exchanges
- 179. Processing orders and refunds
- 180. Managing returns
- 181. Product recommendations
- 182. Upselling and cross-selling
- 183. Handling customer complaints
- 184. Managing product reviews
- 185. 24/7 chat support
- 186. Writing and editing product descriptions
- 187. Social media management
- 188. Writing ad copy
- 189. Creating images for ads and social posts
- 190. Customer research
- 191. Creating blog content
- 192. Track social media performance
- 193. Shopify Development
- 194. Amazon store setup
- 195. Etsy store setup
- 196. BigCommerce management
- 197. Walmart store setup
- 198. Identifying and updating broken links
- 199. Data entry for orders and returns
- 200. Update product lists and prices
- 201. Manage stock levels and place orders
- 202. Prepare inventory documents for taxes



WEB AND APP DEVELOPMENT

Always know your site is secure and up-to-date with a Web Development Virtual Assistant on your team. Need a new website, a faster load time, or a new app for your business? A VA can handle that too.

Web Development VA tasks:

- 203. Website Administration
- 204. IT support
- 205. Adding a chat widget to a website
- 206. Adding meta-data to blog posts and images
- 207. JavaScript
- 208. HTML
- 209. Finding and fixing broken website links
- 210. Monitoring and improving page load speed
- 211. Designing navigation menus
- 212. WordPress Development
- 213. Back-end SEO
- 214. Website backups and maintenance
- 215. Creating sitemaps
- 216. Updating expired offers and other website content
- 217. Updating website themes and plugins
- 218. Migrating data from one platform to another
- 219. Mobile app development
- 220. Bubble.io app development



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GET YOU VA TODAY!

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