**WHAT CAN I DELEGATE?!**

Delegation can be intimidating, but it doesn’t have to be! Below is a list of common items you can delegate to your new personal or administrative assistant. This list is by no means all inclusive, but is a good place to start if you are needing ideas.

|  |  |
| --- | --- |
| **Personal Tasks** | |
| Meal Planning | Scheduling Appointments |
| Grocery Shopping | Event Planning |
| Picking Up Meals | Gift Shopping |
| Picking Up Dry Cleaning | Laundry/Dry Cleaning Pick Up/Drop Off |
| Organizing and Scheduling Bills and Payments\*\* | Organizing and Planning Family Calendar |
| Scheduling Pet Care | Organizing Receipts\*\* |
| Scheduling Household Maintenance | General Household Organization Projects (Closets, Cabinets, Garage, etc) |
| Transportation | Coffee Runs |
| Home Inventory Management (Supplies, groceries, etc) | Deposits |
| Vacation Research | Travel Booking |
| Create and Organize Household Systems |  |
| **Administrative Tasks** | |
| Organizing and Sorting Emails | Tracking Professional License Dates and Requirements |
| Correspondence with Vendors/Contractors | Scheduling |
| Document Creation | Tracking and Organizing of CE |

|  |  |
| --- | --- |
| Office Organization (Break room, Owner Office, Storage Closets) | Research (Products, courses, vendors, etc) |
| File Storage and Organization (Physical and Digital- Google Drive, Drop Box, Etc. ) | Staff Event Planning |
| Managing/Prioritizing Employer Tasks/To-Do Lists | Data Entry |
| Marketing Management (Social Media, Newspapers, Mailers, Recall, Reactivation) | Operations Manual Creation/Organization |
| Drafting Correspondence | Taking Meeting Minutes |
| Placing Ads for Open Positions | Reviewing Resumes |
| Tax Document Organization\*\* | Sending Thank You Notes\*\* |
| Online Research\*\* | Putting Together Welcome/New Patient Gifts |
| Organizing and Sorting Mail\*\* | Returning Phone Calls / Emails\*\* |
| Planning Office Meetings and Retreats | Organizing Employee Birthdays/Work Anniversaries |
| Verify Budgets\*\* | Tracking Referrals |
| Basic Bookkeeping and Tracking | Maintaining Referral Relationships |
| Supply Ordering | Help with Mileage Tracking for Taxes |
| Tracking Deadlines and Deliverables | Moderating Social Media Comments |
| Planning and Scheduling Social Media Posts | Checking Voicemail |
| Content and Blog Creation | Competition Analysis |
| Patient Birthday, Anniversary, etc Cards | Basic Video/Audio Editing for Advertising, Posts, Etc. |
| Manage Equipment Set-Up and Installation | Schedule Office Training (CPR, OSHA, Etc.) |
| General Errands | Liaison between employer and vendors, contractors, etc. |

\*\*Tasks can be applied to personal or administrative positions