

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