



## “Free My Brilliance” – Delegation Planning List

Here is a template to help you plan to get “stuff” off your plate and “free your brilliance”. It will not happen overnight. It’s going to take some time for you to let go, to find the right person or build it into your budget.

So let’s start with what you can delegate and offload right now! Simply tick off the tasks you want to do and then plan for who and how to make it happen. When training, explain the process as you train so they can document for you to review.

For future delegation, consider tasks that can be grouped together to better delegate to your next team member, even if part time. It will help you to understand the skills you need. **How much is your time and energy worth?**

	You	TEAM								
		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b><u>MARKETING &amp; PROMOTIONS</u></b>										
<b><u>AFFILIATES &amp; JV'S</u></b>										
Affiliate management										
JV opportunities										
Set-up Affiliate campaigns										
Run affiliates payment report										
<b><u>EZINES &amp; BLOGS</u></b>										
Ezine writing										
Edits to ezine										
Write blog										
Type blog										
Edit blog										
<b><u>EMAIL MARKETING</u></b>										
Write basic auto responder copy										
Set-up sequencing, tagging & filtering										
Send solo email blasts										
Set-up new email addresses and contact info										
Set-up auto responders										
Set-up Out of Office (OOO) emails										

MARKETING & PROMOTIONS (CONT'D)	You	TEAM								
		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>SOCIAL MEDIA</b>										
Develop Social Media strategy										
Create weekly tweets										
Set-up future tweets										
LinkedIn										
Facebook Business/Fan Page										
Develop Ad strategy										
Facebook Ads										
Instagram										
Pinterest										
YouTube										
Google										
SALES & OTHER MARKETING	You	ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>MARKETING</b>										
Write copy for sales pages										
Write copy for launches										
Lay out annual marketing plan										
Design & develop sales pages										
Design & develop Video										
Develop list building strategies										
Implement list building strategies										
Materials for Submission to publicist										
Create media/publicity strategy plan										
Implement media/publicity strategies										
Organize items required for sponsorships & expo's										
Article marketing										
Collect Testimonials										
Referral campaign										
SEO management										
<b>SALES</b>										
Speaking submissions										
Speaking requests										

Page 3	You	TEAM								
<b>SALES &amp; OTHER MARKETING (CONT'D)</b>		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>SALES (CONT'D)</b>										
Sales calls										
Holding the sale										
Expos & sponsorships										
Seminars										
Research opportunities										
Sponsorship calls										
Travel to support speaking engagements or sales support										
<b>OPERATIONS</b>	You	ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>ADMINISTRATION</b>										
Book Travel										
Systems for the Business (set-up manuals & processes etc.)										
Create PowerPoint presentations										
Create order forms										
Order office supplies & equipment										
Purchase & Maintain URL's										
Organize Team meetings, activities & retreats										
Organize Team calls etc.										
Print materials										
Intake of new employees (some HR involved)										
Maintain current list of all products, programs & prices (and possible inventory)										
Buy Client gifts (Birthday/Special Occasions)										
Buy Team gifts (Birthday/Special Occasions)										
Manage faxes										
Manage the telephones										
Create and Maintain follow-up system for clients, product & program inquiries										
Maintain Filing System & Procedures: Electronic & Paper (including document storage & procedures)(possible resources Google Drive & Dropbox)										
Create print materials for Events & meetings										
Format Word Documents										

OPERATIONS	You	TEAM								
		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>ADMINISTRATION (CONT'D)</b>										
Organize "Access Log-in Sheet" & Maintain (passwords)										
Organize mailings										
Forward emails										
Send via postage any free or purchased products (CD, DVD, workbook, book etc.)										
Manage SendOut Cards (if applicable)										
Organize & ship tradeshow / workshop supplies										
Pick up & sort mail										
Track Client hours (if applicable)										
Set-up In-house meetings										
Arrange for catering for meetings & office (as required)										
<b>PERSONAL ASSISTANT</b>										
Personal Support for yourself – appointments/gifts/etc.										
Schedule appointments: Personal & Business										
Research for personal & business gifts										
Organize personal events										
Organize personal vacations										
Assist in hiring key house staff										
SCHEDULING, PLANNING & FOCUS	You	ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>CALENDARING</b>										
Add call in information to calendar (Promotions, Livestreams, Webinars, Teleclasses, JV's, Fans or Followers)										
Send team reminders about upcoming promotions										
Manage calendars & timelines for projects										
Provide team with key reminders for projects, programs & events										
Manage Marketing Calendar										
Manage your calendar with scheduled Podcasts, Interviews, Teleseminars or Webinars (JV's, Promo's & Fans)										

Page 5	You	TEAM								
		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>SCHEDULING, PLANNING &amp; FOCUS (CONT'D)</b>										
<b>CALENDARING (CONT'D)</b>										
Update Team about your calendar										
<b>METRICS</b>										
Gather weekly ezine statistics										
Daily updates of products sold or new sign-ups for programs being launched										
Track attendance at events or programs										
<b>PRODUCTS &amp; PROGRAMS</b>										
Set-up payment codes for products & programs										
Set-up "Share-With-a-Friend" programs										
Project Manage Launch checklist										
<b>WEBSITE</b>										
Update upcoming events on website										
Create basic web pages										
Website backups										
<b>TECHNICAL</b>										
Navigate Infusionsoft (or other provider)										
Set-up email / hosting servers										
Set-up forums & groups										
Set-up new email addresses										
<b>CLIENT EXPERIENCE &amp; DELIVERY</b>	<b>You</b>	ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>CUSTOMER SERVICE &amp; CLIENT RELATIONSHIPS</b>										
Manage all support or "Call Ticket" emails (with specific turnaround)										
Support and "Call Ticket" phone calls										
Provide support for online "Chat" inquiries during live online events										
Strategic collaboration with CEO & team members										

Page 6	You	TEAM								
		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>CLIENT EXPERIENCE &amp; DELIVERY (CONT'D)</b>										
<b>CUSTOMER SERVICE &amp; CLIENT RELATIONSHIPS (CONT'D)</b>										
Manage automated scheduling tool										
Set-up Strategy Days or Appointments with Clients										
Communicate food, travel & logistics info for Strategy Days or appointments to client										
Client emails										
Client communication										
Maintain & update Client/Program Onboarding procedures										
Send "Welcome" packets to new clients										
Send reminders to clients to schedule monthly calls or appointments										
Manage all support messages										
Send gifts, cards etc.										
<b>PROGRAM / PRODUCT MAINTENANCE</b>										
Manage fulfillment of products being produced by fulfillment house										
Set-up calls in service provider for teleseminars or webinars										
Develop and design program outline, subjects & regimen										
Add call recordings to forums (if any)										
All program management										
Product development & creation										
Set-up and maintain Fan/Followers lists										
Create written documentation of systems										
Set-up new products with fulfillment house										
Determine and obtain Experts (as required)										

CLIENT EXPERIENCE & DELIVERY (CONT'D)	You	TEAM								
		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>CLIENT CONCIERGE</b>										
Manage automated Scheduling tool										
Set-up Strategy Days with Clients										
Communicate food, travel and logistics information for Strategy Days to client										
Client emails										
Client communication										
Maintain & update Client/Program intake procedure										
Send 'welcome' packs to new clients										
Send monthly reminders to clients to sign up for Coaching Calls										
Manage all support emails (with specific turnaround)										
Manage support phone calls & messages										
Send gifts										
Ensure coaching hours are scheduled out in calendar										
<b>EVENTS</b>										
Handle event sponsors intake & communication										
Contact any 'special' ticket holders										
Event assistance with planning/organization										
Set-up space for Masterminds or Strategy Days										
Set-up 'Welcome' letters or packages for event										
Organize spaces for meetings										
Set-up space for 'Strategy' days										
Arrange BEO (Banquet Event Order) for refreshments or food										
Oversee contract negotiations										
Maintain sign ups & registrants for events										
Track hotel room blocks/RSVP's for Mastermind and/or group programs										
Handle all event set-up										
Set-up reminders for attendees (hotel, food, specials, bonuses, how to plan for & what to expect)										

FINANCE & LEGAL	You	TEAM								
		ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>FINANCE &amp; LEGAL</b>										
Expense Reports										
Client contracts – create, update & maintain										
Run cash-flow sheet										
Run Payroll										
Run & manage client payments										
Declined payments – track/manage										
Track Vendor A/R & A/P										
Track Client A/R & A/P										
Set-up maintain customer contact list with any updates										
Set-up client payment for one time or recurring										
Assist customers with past due balances in a mutually beneficial manner										
Maintain system for collections, including letters and contact preference										
Assist in processing customer orders, filling out forms, applications & requests										
Maintain & Manage online payment programs (including PayPal, Infusionsoft etc.)										
Record details of inquiries, comments and complaints regarding collections										
Assist Clients with resolving conflict of scheduled payments										
Prepare, review & finalize monthly and annual financial reporting										
Budgeting, financial forecasting & cash-flow (for administration for any existing products or programs)										
Strategic collaboration with CEO & team members for budget planning										
Provide & maintain all accounting reports (documentation & info required for successful planning)										
File & prepare taxes with the Accounting firm hired to represent the business										
Maintain & update current accounting software systems										



Page 9	You	TEAM								
<b>FINANCE &amp; LEGAL (CONT'D)</b>	You	ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>FINANCE &amp; LEGAL (CONT'D)</b>										
Update records, processing & distribution of payroll records										
Update records, processing & distribution of contract payments										
Update, process & distribution of A/P										
Reconcile A/R monthly to contracts ensuring proper collection times & amounts										
Track any launch & event costs & receipts										
Set-up direct billing for events										
<b>MISCELLANEOUS</b>	You	ADMIN VA	TECH VA	SOCIAL MEDIA	BOOK-KEEPER	OBM	CLIENT CONCIERGE	INTERN	OTHER	SPECIALTY REQUIRED
<b>ADDITIONAL ITEMS</b>										