



Outsourced task checklist

Task	Frequency required (daily/weekly/Monthly)	Training required (Y/N)
Finances		
Managing expenses (using a system e.g. Xero and ClickBank to capture receipts etc.) If high volume though, may be worth considering a bookkeeper		
Invoicing – depends on volume – may be worth considering a bookkeeper		
Debt collection – an online system such as Xero, should have the option for automatic credit control		
Admin		
Follow-up calls to make/confirm appointments		
Event organisation		
Writing/formatting minutes		
Helping with quotes		
Buying supplies (stationery etc.)		
Booking events for you e.g. networking		
Adding your business cards to your CRM		
Other admin - list		
Marketing		
Posting blogs		
Posting events		
Mailing out blogs/newsletters		
Helping create newsletters		
Help with/managing your social media		
Sending out marketing information		
Coordinate customer mailings/managing mailing database		
Helping create lead magnets (in mailchimp as an example)		
Other marketing activities - list		
Activities you should definitely outsource		
Accountant		
Bookkeeping – only if you have high volumes of invoices and receipts		
Payroll		