



**I know I need help with running my business...  
but what could I legitimately outsource?!**

**Here are 90 for starters  
(and yes, we've experience in all of them)...**

**CRM & diary management**

1. Provide customer support to your own contacts – your membership, or more general billing support, troubleshooting.
2. Add birthdays and anniversaries to your calendar so an important event is never missed.
3. Send out e-cards or post cards on your behalf.
4. Provide support on how to tame (and then maintain) that email inbox.
5. Add inbox items to your chosen task management system.
6. Provide updates on projects.
7. Schedule brief check-in calls to look ahead and plan work around upcoming dates/deadlines.
8. Take notes during calls to capture important information.
9. Update your CRM with the latest information.
10. Keep the CRM up to date when contact details change.
11. Block out your calendar to identify times you are out of the office.
12. Put together an email signature that pulls together key information, your tagline, etc.
13. Add all school holiday dates or university term dates to your calendar.
14. Add time-blocking for deep focus work - reading, writing, marketing, client work, etc.
15. Set up an online scheduling tool so people can find their own suitable times to book in with you (e.g. Calendly).

16. Add entries/reminders in the calendar to note deadlines, key dates, upcoming events etc.
17. Include comprehensive details for each calendar item – meeting title, location/who's calling who and how, agenda for discussion.
18. Colour code appointment types to easily identify which relate to client attraction, key client meetings, travel time, or even personal items.
19. Organise your contact information – e.g. adding business card details to your Contacts, sorting them into categories.

### **Marketing and communications**

20. Type up your notes and format in line with your branding.
21. Create templates in Word for the different types of documents you regularly need.
22. Transform your Word notes into a branded Canva file to use as a freebie lead magnet.
23. Regularly check the website for broken links, old data & update content or liaise with web developers on your behalf to resolve.
24. Research groups you could join (LinkedIn, free/paid Facebook groups) where your target audience is/you can position yourself as the expert.
25. Connect with/decline/follow new connections on social media.
26. Review tags/mentions and highlight to you accordingly.
27. Respond to initial messages using pre-agreed canned responses.

## Reports

- 28. Proofread professional and academic reports - sense checking, spelling and grammar checks.
- 29. Format documents so design and layout is professional, content easy to read and that they adhere to brand guidelines.

## Blogs

- 30. Post content to your blog.
- 31. Source suitable blog images.
- 32. Moderate blog comments.
- 33. Add blog content to LinkedIn as an article and Facebook as a Note.
- 34. Create and maintain a master file of blog posts for ease of reference – title, date of posting, tags, URL.
- 35. Research strategic partners who accept guest blogs.

## Organising/streamlining systems to increase efficiency

- 36. Organise and tidy Dropbox/GoogleDrive or similar shared space.
- 37. Set up/update social media so they all have cohesive branding – profile picture, banner, bio wording, language.
- 38. Connect your social media accounts to a scheduling tool such as SmarterQueue, HootSuite, etc.
- 39. Ensure regular content is available and does not run out – reminding you when it's running low.
- 40. Add blog content to evergreen categories in your social media tool.
- 41. Respond to initial messages using pre-agreed canned responses.
- 42. Write up standard operating procedures (SOPs) to enable tasks to be picked up by others in your team/business continuity planning.

## Newsletters/email campaigns

43. Keep a running log of information that could be included in a newsletter – blogs you've written, upcoming events/courses you're running, or press you've been featured in.
44. Format your newsletter broadcast in your chosen system (MailChimp, ActiveCampaign etc.) – checking for accurate links, quotations, name citations, image sizing.
45. Schedule or send the broadcast.
46. Repurpose the newsletter content by adding to your blog or social media.
47. Manage your mailing list (including creating segments etc.)

## Team Development

48. Research specialists for a wider team - copywriters, web designers, graphic designers.
49. Write job descriptions for team roles and support you with recruitment.
50. Keep you accountable for regularly marketing activities such as a weekly blog, Facebook Lives, LinkedIn articles, Instagram Stories, etc.
51. Research groups you could join (LinkedIn, free/paid Facebook groups) where your target audience is/you can position yourself as the expert.

## Meetings (Servicing)

52. Organise your meetings – date, venue, refreshments, invites.
53. Co-ordinate and circulate agenda and papers.
54. Take minutes.

## Training & Events

55. Put together a brochure of all your training/events for the year to support your marketing.
56. Assist you with managing your online courses (e.g. via Thinkific)
57. Pull together existing content and create a social learning unit in your Facebook group.
58. Research venues to hold a live event.
59. Schedule coaching calls/meetings for you on Zoom.
60. Propose best travel options – trains, flights, accommodation.
61. Liaise with the venue on room layout, timings, breaktimes, special dietary requirements, resources, AV, etc
62. Liaise with graphic designers and printers re stand displays/banners etc.
63. Source branded merchandise for events and manage orders.
64. Research break-out activities for event delegates.
65. Assist in marketing an event by understanding the project plan and key activities – early bird offers, fast-action bonuses, webinars, phone calls, etc.
66. Set up the event on your chosen platform (e.g. Eventbrite)
67. Provide registration details and schedule to delegates.
68. Ask delegates to complete a pre-event survey to understand what they hope to achieve.
69. Present survey results in Excel to you and highlight any pertinent requirements/responses.
70. Provide on-site event support on the day (where appropriate).
71. Send follow-up information after the event – e.g. certificates of attendance, as appropriate.

- 72. Connect with hosts via social media.
- 73. Update social media banners and bios to promote your latest offering.
- 74. Create branded PowerPoint slide decks.
- 75. Create quotes for social media using your own LinkedIn testimonials.
- 76. Go through emails that are sent regularly to create canned responses and email templates.

### **Speaker support**

- 77. Find events where you can either speak directly to your target audience or position yourself as an expert in front of them.
- 78. Sign up for newsletters (one less thing in your inbox) and update you when key events are announced.
- 79. Submit speaker request forms on your behalf.
- 80. Connect with the event's key organisers and other speakers.
- 81. Assist with creating presentation materials and handouts for your talk.
- 82. Research events (networking, conferences) where your target audience will be.

### **Finance**

- 83. Assist with basic bookkeeping – e.g. sending out invoices on your behalf, chasing payments, logging receipts.
- 84. Planning and support around setting out a simple budget for the year and putting a monitoring system in place.
- 85. Set up payment plans on GoCardless and link up to your website to allow for people to subscribe to a variety of packages requiring regular payments.



## Lifestyle Management

- 86. Find cheaper utility suppliers, a new mobile phone contract, or summer holiday club for your children.
- 87. Research gifts for clients, friends or family members.
- 88. Write and post cards on your behalf.
- 89. Research restaurants and make bookings for your client meetings/family occasions.
- 90. Help organise that big birthday you've been trying to forget about.