

WHAT TO DELEGATE FIRST

Hand these off first.

Nearly 50 tasks US business owners most often give to a virtual assistant, grouped by department and marked by how ready each one is to hand over.

The three-question test

- 1. **How often does it happen?** Daily and weekly tasks repay the setup fastest.
- 2. **Does it follow rules?** If you can explain it in steps, someone else can do it.
- 3. **Is it easy to check?** Start with work you can verify in seconds.

How to read the ratings

- NOW** Hand over this week with a quick walkthrough.
- SOP** Record a short how-to or write the steps first.
- LATER** Delegate once your VA knows your business.

Admin and your time

TASK	READY
Scheduling meetings and managing your calendar	NOW
Inbox triage with labels	NOW
Drafting routine email replies	SOP
Meeting notes and follow-up emails	NOW
Travel booking and itineraries	SOP
Document formatting and filing	NOW
Web research and summaries	NOW
Personal admin: renewals and bookings	SOP
Preparing briefing notes before calls	LATER

Sales

TASK	READY
Updating the CRM after calls	NOW
Researching prospects before meetings	NOW
Following up with new inbound leads	SOP
Booking discovery calls	NOW
Building prospect lists	SOP
Sending proposals from templates	SOP
Re-engaging old leads	SOP
Weekly pipeline report	NOW
Running outbound sequences	LATER

Marketing

TASK	READY
Scheduling posts from an approved calendar	NOW
Replying to comments and messages	SOP
Resizing and updating graphics	NOW
Monthly analytics reports	NOW
Uploading videos with descriptions	SOP
Updating listings and directories	NOW
Writing content briefs	LATER
Newsletter formatting and sending	SOP
Keyword and competitor research	SOP

Customer support

TASK	READY
Answering common questions with approved replies	NOW
Order status and shipping updates	NOW
Tagging tickets so trends show	NOW
Refunds and exchanges within a set limit	SOP
Account and password help	SOP
Updating saved replies and help articles	SOP
Returning missed calls	SOP
Handling upset customers	LATER

Finance

TASK	READY
Sending invoices	NOW
Payment reminders for overdue invoices	NOW
Categorizing transactions	SOP
Matching receipts to expenses	NOW
Tracking bills that are due	NOW
Monthly reconciliations	SOP
Month-end package for your CPA	LATER

Keep these for yourself

- ♦ Pricing and major spending decisions
- ♦ Hiring, firing and difficult conversations
- ♦ Your most important client relationships
- ♦ Strategy and anything you haven't figured out yet

Your VA can still prepare the research and options for each one.

Operations

TASK	READY
Onboarding checklists for new clients	SOP
Keeping the task board current	NOW
Writing SOPs from your screen recordings	NOW
Vendor and supplier follow-ups	SOP
Weekly operations report	SOP

Automate instead?

If a task follows the exact same rules every time, like copying form entries into your CRM or sending reminders, an automation may beat a person. Automate the fixed steps, and delegate the judgment calls.

NEXT STEP

Want help turning this list into a role?

snovaph.com/book

Book a free 30-minute discovery call with Snova PH.