



THE ULTIMATE BOUNDLESS TASK CHECKLIST

160 tasks that can be outsourced to our Boundless Specialists

Calendar Management	Not now	Yes now	System built
1. If requested, schedule meetings with people and put in the manager's diary			
2. If requested, reconfirm the manager's appointments 24 hours before the meeting			
3. Look 2 weeks ahead and ensure meeting details are in the diary			
4. If the meeting is off-site, block the travel time and link to map			
5. After meetings, ask if notes are needed and if so put into CRM			
6. If requested, book meeting room and add details in manager's diary			
7. If requested, make restaurants bookings and put in manager's diary			
8. If requested, book accommodation and put in manager's diary			
9. If requested, book flights and add details in manager's diary			
10. Put staff birthdays in a calendar and remind manager as requested			

Admin Tasks	Not now	Yes now	System built
11. When you learn anything new, make a system in Google Sites			
12. Work with manager to help them document systems in Google Sites			
13. When trained, take systems and turn them into 1-page flowcharts			
14. If requested, attend meetings with manager and take meeting minutes			
15. When trained, assist manager with stock take and re-ordering new stock			
16. When trained, work with manager to pay outstanding invoices			
17. Ensure files added to Google Drive, Dropbox are correctly labeled			

18. When required, prepare travel itineraries for manager or team members			
19. If requested, track missing or delayed packages and ensure they arrive			
20. If requested, help manager organise company events and parties			

Customer Service	Not now	Yes now	System built
21. Check all incoming emails and delete all spam messages for manager			
22. Work with manager to identify wanted promotional emails and forward			
23. Work with manager to identify unwanted promotional emails and archive			
24. Work with manager to write canned replies to all common emails			
25. Check company Inbox 3-4 times per day and reply to common emails			
26. For difficult emails, notify the manager and support them to reply			
27. Check company Spam Folder once a day to find and retrieve non-spam			
28. When trained, answer incoming phone calls and assist with enquiries			
29. Check company voicemail 3-4 times per day and call back or forward			
30. When trained, make outbound phone calls to leads and customers			
31. Check Facebook page messages and reply or forward all messages			
32. If you have Live Chat on website, manage all messages and reply			
33. Email or call people that have recently left a Review to say thank you			
34. When trained, review feedback forms and summarise key findings			
35. If requested, organise gifts or hampers to be sent to VIP clients			

Sales Support	Not now	Yes now	System built
36. When trained, assist manager to respond to sales inquiries ASAP			
37. When trained, work with manager to prepare sales proposals/quotes			
38. Work with manager to improve quality and speed of proposals/quotes			
39. When trained, work with manager to prepare and send all invoices			
40. When trained, follow up all outstanding invoices and seek payment			
41. When trained, enter new customers or orders into company system			
42. When trained, assist manager with the onboarding of new customers			
43. When trained, assist manager to send clients Happy Birthday messages			

44. Work with manager to review and update your price list as required			
45. Work with manager to plan future sales campaigns and promotions			

Project Management	Not now	Yes now	System built
46. Take any new task given to you and put into a task management tool			
47. Check tasks due today and complete them or mark percentage complete			
48. If you have a lot of tasks, ask your manager to help prioritise your list			
49. When trained, oversee your manager's task list and keep it updated			
50. When trained, oversee the task list of other assistants and team members			

Website Update & Management	Not now	Yes now	System built
51. Work with manager and copywriter to add new content to website			
52. Add new posts/pages to blog when you have new articles/videos			
53. Ensure all images on the website are optimised for size and SEO			
54. Test website on various devices and make a list of all the errors			
55. Run a speed test on the website and make a list of issues to fix			
56. Work with website developer to manage and fix all the errors			
57. Use tools like YOAST to fix all titles and descriptions for SEO			
58. Use tech tools to find, fix or redirect all dead website pages			
59. Work on increasing the number of backlinks to company website			
60. If using WordPress, update to the latest version and manage plug-ins			
61. Set up Google Tag Manager and ensure desired tracking is working			
62. Review Google Analytics, gather insights and report key findings			
63. Set up Google Goals to discover the conversion rate of key pages			
64. Set up Google Optimize to split-test headlines and images on site			
65. Install HotJar on your website, review results and report findings			
66. Work with manager to create and update your website's FAQs page			
67. Review support emails monthly to suggest possible website changes			
68. Work with manager to review new testimonials and put on website			
69. Set Up Google Alerts, scan daily and report key findings to manage			

eCommerce (if needed)	Not now	Yes now	System built
70. Work with manager to write titles and descriptions for new products			
71. When you're trained, collect and edit all images for new products			
72. If required, make short promotional videos to go with new products			
73. When you're trained, add new products into your shopping cart			
74. Test new product pages on desktop and mobile to ensure it's right			
75. When trained, add new products onto Amazon and manage marketing			

CRM Management	Not now	Yes now	System built
76. Review all new contacts daily and delete any spam emails			
77. Review new contacts and capitalise the first letter of names			
78. Ensure all mobile phone numbers are properly formatted for SMS			
79. Remove subscribers from your list that requested to be removed			
80. Find emails perpetually hard bouncing, call/SMS to get a new email			
81. If a mail is returned to sender, call/SMS to get a new postal address			
82. Go through CRM to find leads that are slipping away and alert manager			
83. After meetings, ask manager for notes and outcome and update CRM			
84. If required, create new customers lists for future marketing campaigns			
85. If required, work with team members to prepare labels for mail outs			
86. Send a weekly report to your manager with numbers of new leads			
87. Work with manager to discuss what activities could be automated			
88. When trained, work with manager to plan and build auto-responders			

Email Marketing	Not now	Yes now	System built
89. Work with manager to plan marketing emails needed for the month			
90. Work with copywriter to get the copy required for marketing emails			
91. Enter emails with copy, images and links into your email platform			
92. Send manager final tests of marketing emails and get approval			
93. Send out marketing emails at the agreed time and monitor results			

Content Creation	Not now	Yes now	System built
94. Use tools like Answer the Public to research content ideas			
95. Study industry blogs, forums and groups to find content ideas			
96. Work with manager to decide topics you will create content on			
97. Find articles or content that can be shared via social media			
98. Work with manager to write copy to go with the social posts			
99. If needed, use tool like Otter.ai to convert audio into text			
100. Work with the copywriter to turn audio and text into articles			
101. Find royalty-free images to accompany articles and social posts			

Podcasting	Not now	Yes now	System built
102. Find podcasts where your manager can be interviewed as a guest			
103. Send email to podcast hosts offering your manager as a guest			
104. If company has a podcast, find and email guests for your podcast			
105. If company has a podcast, edit podcast recordings and save them			
106. If company has a podcast, upload to podcast hosting platform			
107 If company has a podcast, prepare and launch new episodes			

Video Marketing	Not now	Yes now	System built
108. Help manager plan out videos that need to be recorded			
109. When trained, manage the editing and exporting of videos			
110. Write titles, descriptions and promotional copy for videos			
111. Manage the uploading of videos to YouTube and other places			
112. Manage all the comments that appear in response to videos			
113. Review the stats of your YouTube Channel and find insights			

Graphic Design in Canva	Not now	Yes now	System built
114. Design posts for Facebook, Instagram, LinkedIn, etc			
115. Design stories for Facebook and Instagram			

116. Design promotional images that go into emails			
117. Design flyers or posters for upcoming promotions			
118. Design infographics to feature alongside content articles			
119. If required, design Facebook and Instagram image ads			
120. If requested, design invitations, brochures or cards			
121. If requested, design presentation slides for your manager			
122. When trained, work with manager and writer to design Mobimag			
123. When trained, work with manager and writer to design Mobimag			
124. Resize and crop photos before uploading to social media			
125. Research and document ideas for future social media content			
126. Use social media scheduling tool to save time (personal pages)			
127. Use social media scheduling tool to save time (company pages)			
128. Work with manager to reply to social media comments or DMs			
129. Work with manager to comment on posts made by key contacts			
130. Send Happy Birthday messages to friends on Facebook			
131. Check Facebook Groups and look for posts to engage with			
132. If company has a Facebook Group, manage aspects of running it			
133. Accepting or declining LinkedIn connection requests			
134. Work with manager to update and then maintain LinkedIn Page			
135. When trained, assist manager to manage their LinkedIn			

Marketing	Not now	Yes now	System built
136. When trained, create a list of businesses you can partner with			
137. When trained, work with manager to reach out to new partners			
138. When trained, make outbound phone calls to find more customers			
139. When trained, monitor Facebook Ads account and report results			
140. When trained, find new LinkedIn connections for your manager			
141. When trained, monitor SourceBottle and alert manager to opportunities			

Bookkeeping	Not now	Yes now	System built
-------------	---------	---------	--------------

142. When trained, work with manager to do basic bookkeeping tasks			
143. When trained, work to track expenditure compared to budgets			
144. When trained, manage the sending of receipts to clients			
145. When trained, manage the issuing of refunds to clients if approved			
146. If requested, find missing receipts for tax records purposes			

Human Resources	Not now	Yes now	System built
147. Work with manager to create job descriptions and ads for new hires			
148. When trained, post new job ads onto required job boards/sites			
149. When trained, assist manager to review and filter new job applicants			
150. When trained, assist manager with the onboarding of new employees			
151. Set reminders for staff birthdays, work anniversaries, performance reviews			

Research	Not now	Yes now	System built
152. When trained, research target market and prepare findings for manager			
153. When trained, research competitors and prepare findings for manager			
154. When trained, research awards you can enter and prepare submissions			
155. If requested, find workers on Fiverr or Upwork to complete key jobs			
156. If requested, research suppliers for works, create brief and request 3 quotes			
157. If requested, find new technology tools and summarise findings for manager			
158. If requested, research industry trends and summarise findings for manager			
159. If requested, attend webinars for your manager and summarise findings			
160. If requested, research gifts for staff, customers, family or friends			

By prioritizing user-friendly systems and comprehensive Boundless Specialist training, we unlock streamlined operations and significant **Boundless Savings**, leading to optimized efficiency and **Boundless Time** for our team. As a result, we're equipped with **Boundless Solutions** to tackle any challenge.