



Thanks for downloading this workbook, you can either complete this electronically, or print out and complete manually, whichever your preference is!

Below you will find charts separated into sections to reflect the different departments/areas of your business, these are generic to cover different businesses— if there is anything missing for your business specifically, please add those tasks to the chart titled “Other”. You can also use this space to add any items you know are in the pipeline and start thinking about who should be managing that.

Once you have gone through all of the charts, at the end of this document, you will find a separate space where you can list all of the tasks you now know you can outsource, whether that be immediately or in the future. This now gives you an overview of the types of tasks you want to be outsourcing.

If after then reading through the list you think yes, I could definitely do with some help now, please feel free to get in touch and schedule a free consultation with me to go through your requirements!

## UNPACKING EXERCISE

- 1 List every task, role, responsibility in your business. Go into as much detail as possible. For example, don't just say "Social Media" as there are likely multiple different tasks associated to your social media work.
- 2 Write down who is currently performing this task/role/responsibility. If you are currently doing everything, please write your own name down.
- 3 Write down who should be handling this task. This could be you, another staff member, a business partner, or if you know it should/could be handled by someone else, but you aren't sure who yet, simply write "Someone else".
- 4 Only keep your name next to those roles/responsibilities that you enjoy or have the highest financial leverage. If your time is best spent working with clients, as that's what brings in money, then keep your name there. If your time is not best spent responding to emails, then write "Someone else" there.
- 5 For the tasks you have marked as “Someone else”, identify if this is something you could outsource to a Virtual Assistant (VA). If you don't yet know who that VA is, that's fine! By going through this exercise, you are identifying the tasks you need help with, and therefore the type of support you need.

(Example of how to complete)

Tasks in Business	Who is currently performing the task?	Who should be performing the task?	Can I outsource this?
Creation of monthly newsletter content	Me	Someone else	Yes
Emailing out Newsletter	Me	Someone else	Yes
Ad hoc email campaigns	Me	Someone else	Yes
Copy for email campaigns	Me	Me	Maybe
Checking emails	Me	Someone else	Maybe
Customer support emails	Me	Someone else	Yes
Diary management	Me	Someone else	Yes
Blog updates to website	Me	Someone else	Yes
Other website updates	Me	Someone else	Yes
New business enquiries	Me	Me	No
Coaching sessions	Me	Me	No
Bookkeeping	Alex (bookkeeper)	Alex (bookkeeper)	
Sending invoices	Me	Someone else	Yes
Chasing late payments	Me	Someone else	Yes













