

# Outsourcing Checklist for Independent Business Owners (UK)

If you're feeling overwhelmed by admin, marketing, and business operations, outsourcing to a **Virtual Assistant (VA)** or **Online Business Manager (OBM)** can help free up your time. Use this checklist to identify tasks you can delegate.

## HOW TO USE THIS CHECKLIST

1. **Tick the tasks that drain your time & energy.**
2. **Decide which ones you'd love to delegate first.**
3. **Explore working with a VA or OBM who understands your industry.**

## ADMIN & CLIENT MANAGEMENT

- Inbox & email management (responding to inquiries, filtering spam)
- Diary/calendar management & appointment scheduling
- Client onboarding & offboarding (contracts, intake forms, welcome packs)
- Sending reminders for appointments, invoices, or follow-ups
- Managing online booking systems (Acuity, Calendly)
- Handling customer service & responding to FAQs
- Transcribing & summarising client notes or meetings
- Managing digital filing systems & document organisation

## BILLING & FINANCE SUPPORT

- Invoicing clients & tracking payments (Xero, QuickBooks, PayPal, Stripe)
- Chasing late payments professionally
- Expense tracking & basic bookkeeping support
- Processing refunds or cancellations
- Setting up payment plans or subscription services

## **MARKETING & SOCIAL MEDIA**

- Creating & scheduling social media posts (Instagram, Facebook, LinkedIn)
- Engaging with comments, messages & followers
- Repurposing content (turning blogs into social posts or videos)
- Researching industry trends & content ideas
- Creating simple graphics & branded materials (Canva)

## **COURSE & MEMBERSHIP SUPPORT**

- Uploading & managing online course content (Thinkific, Teachable, Kajabi)
- Setting up membership sites & handling renewals
- Managing student or client communication & support
- Creating resources, PDFs & worksheets
- Editing & formatting presentations or course materials

## **PODCAST & VIDEO SUPPORT**

- Editing & uploading podcast episodes
- Writing show notes & timestamps
- Creating audiograms & promo clips
- Managing YouTube channel & video uploads
- Writing video descriptions & optimising for SEO

## **TECH & AUTOMATIONS**

- Setting up automated email sequences & workflows
- Managing CRM systems (HubSpot, Dubsado, HoneyBook)
- Creating forms & surveys (Google Forms, Typeform)
- Troubleshooting tech issues & integrations
- Setting up automation tools (Zapier, Airtable, Asana)

## **PERSONAL LIFE ADMIN (Work-Life Balance)**

- Researching retreats, events, or training opportunities
- Booking travel & accommodation for business trips
- Sourcing gifts for clients or staff
- Managing subscriptions & memberships