OUTSOURCING TASKS CHECKLIST FOR COACHES

assist the coach

ADMIN & SCHEDULING

- ◯ Inbox Management
- ◯ Calendar & Bookings
- ◯ Documents & Onboarding
- ◯ Data Entry

CLIENT SUPPORT

- ◯ Send onboarding + welcome emails
- ◯ Set up client portals
- ◯ Sessions Management
- ◯ Collect and post testimonials

FINANCIAL ADMIN

- ◯ Creating + Sending Invoices
- ◯ Bookkeeping
- ◯ Payment + Income Tracking
- ◯ Expense Management
- ◯ Pricing Strategies

MARKETING & CONTENT

- ◯ Social Media Management
- ◯ Content Creation
- ◯ Video Editing & Podcasts
- ◯ Google Ads
- ◯ Social Media Ads
- ◯ Marketing Strategy
- ◯ Website SEO
- ◯ Posts Engagement
- ◯ Email Marketing
- ◯ Online Course Creation

BUSINESS GROWTH TASKS

- ◯ Business Tools Research
- ◯ Market Research
- ◯ Competitor Analysis
- ◯ Technology Support

WEBSITE EDITS

- ◯ Add new content to the website
- ◯ Update existing content
- ◯ Upload images or resources to the website
- ◯ UX Improvements + Graphic Design

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ANALYTICS

- ◯ Connect + monitor Google Analytics
- ◯ Set up Google Search Console
- ◯ Set up simple performance dashboards

TECH SUPPORT

- ◯ Troubleshoot website errors
- ◯ Set up booking/payment tools
- ◯ Fix email errors
- ◯ Create landing page + funnels

How To Use This Checklist:

1. Mark **1-3 tasks** to outsource that drain your time or energy or that you are not good at.
2. Go to the Assist the Coach website and click on **"Post Project",** and fill in the project submission form so that we can add your job listing to the live board.
3. Connect with freelancers directly and utilise our downloadable templates to create customised pricing agreements and NDA's.
4. Track your outsourcing and update your checklist as you grow.
5. If happy with the service, then use this checklist to add another project.

This checklist, if used effectively, will help you decide which tasks are draining your energy so that you can outsource them and save time.

Saving time = **More time on Coaching** = **Increased Business Success** + **Growth**

If you want to use this checklist and outsource, then click on the link below to start the process:

https://assistthecoach.com/post-a-project

Tel: 07355656680   Email: info@assistthecoach.com   Website: assistthecoach.com