

What You Could Hand Over

A working checklist of the tasks in a small business that a machine, or somebody who is not you, should be doing.

Most owners cannot answer “what would you like to automate?” They stopped seeing the work years ago — it has been done this way for so long that it feels like the job rather than a symptom of one.

So do not try to answer from memory. Work down the list and mark each line honestly. The pattern that emerges is the point: it usually shows a handful of hours a week being spent on work that nobody needed a human for.

Then bring it to the session. We will not act on all of it. We will find the three that matter and build those first.

SIX THINGS TO LOOK FOR

1. You re-type something that already exists somewhere else.
2. A spreadsheet is the bridge between two systems.
3. The task runs on a schedule and a person is the reminder.
4. A PDF gets printed so numbers can be typed back in.
5. The answer is always in the same three places.
6. You would be embarrassed to show a customer how it is done.

AUTO A machine does it, unattended. **VA** Needs a person — but not you.

BOTH Automate the routine path, route the exceptions to a person.

TASK	BEST BY	I DO THIS NOW	HAND IT OVER	NOT RELEVANT
Your inbox, your calendar, your day <i>Where most of the reclaimed hours actually come from</i>				
Sorting and filing the inbox, killing the spam	BOTH	☐	☐	☐
An instant acknowledgement to every enquiry, with a response time	AUTO	☐	☐	☐
Taking bookings, rescheduling and cancellations	AUTO	☐	☐	☐
Managing your diary and protecting blocks of focused time	VA	☐	☐	☐
Reminders to clients before a session or appointment	AUTO	☐	☐	☐
Chasing the people who have not replied	AUTO	☐	☐	☐
Travel and accommodation booking	VA	☐	☐	☐
Answering the phone and clearing voicemail	VA	☐	☐	☐
Personal errands and online purchasing	VA	☐	☐	☐
Enquiries, clients and the pipeline <i>The gap between someone raising a hand and someone paying you</i>				
Website enquiries landing straight in the CRM, not an inbox	AUTO	☐	☐	☐
Routing each enquiry to the right person or service	AUTO	☐	☐	☐
Quotes and proposals assembled from templates and current prices	BOTH	☐	☐	☐

TASK	BEST BY	I DO THIS NOW	HAND IT OVER	NOT RELEVANT
The follow-up sequence on quotes nobody answered	AUTO	☐	☐	☐
Alerts when a deal has gone quiet or a stage has not moved	AUTO	☐	☐	☐
Answering the questions you get asked over and over	BOTH	☐	☐	☐
Onboarding a new client: welcome, forms, access, first steps	AUTO	☐	☐	☐
Asking for feedback and reviews once the work is done	AUTO	☐	☐	☐
Logging, tracking and reporting complaints	BOTH	☐	☐	☐
Keeping the CRM clean: duplicates, missing fields, dead records	BOTH	☐	☐	☐
Prospect research and building lists	VA	☐	☐	☐

Money in, money out *Usually the richest seam, and the one owners feel most*

Raising and sending invoices	AUTO	☐	☐	☐
Payment reminders that escalate on their own	AUTO	☐	☐	☐
Capturing supplier invoices into the accounting system	AUTO	☐	☐	☐
Matching purchase orders against receipts and invoices	BOTH	☐	☐	☐
Bank reconciliation rules	AUTO	☐	☐	☐
Expense capture and coding	AUTO	☐	☐	☐
Recurring, retainer and milestone billing	AUTO	☐	☐	☐
Working the debtor list and making the chase calls	VA	☐	☐	☐
Assembling the month-end pack	BOTH	☐	☐	☐
Day-to-day bookkeeping in Xero, MYOB or QuickBooks	VA	☐	☐	☐

Files, documents and records *The quiet tax on every week*

Naming, filing and organising Drive, Dropbox or SharePoint	BOTH	☐	☐	☐
Data entry into documents and spreadsheets	BOTH	☐	☐	☐
Building and maintaining the spreadsheets everyone relies on	VA	☐	☐	☐
Slide decks and presentations	VA	☐	☐	☐
Splitting, merging and converting PDFs	AUTO	☐	☐	☐
Transcribing audio and video	AUTO	☐	☐	☐
Turning a meeting recording into action items in the task system	AUTO	☐	☐	☐
Document templates and version control	BOTH	☐	☐	☐
Routing documents for approval and signature	AUTO	☐	☐	☐
Searching across your own documents to find an answer	AUTO	☐	☐	☐
Summarising long contracts, tenders and reports	VA	☐	☐	☐

Content and social *Nothing here needs to be done by the person whose face is on it*

First drafts of posts, captions and articles	VA	☐	☐	☐
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TASK	BEST BY	I DO THIS NOW	HAND IT OVER	NOT RELEVANT
Scheduling and cross-posting to every channel	AUTO	☐	☐	☐
Cutting long content into short-form pieces	VA	☐	☐	☐
Tags, alt text and image credits	BOTH	☐	☐	☐
Moderating comments and replying to them	BOTH	☐	☐	☐
Answering direct messages across every channel	VA	☐	☐	☐
Building and maintaining the content calendar	VA	☐	☐	☐
Image and graphic work in Canva	VA	☐	☐	☐
Video editing: intros, outros, captions, cleaning up the audio	VA	☐	☐	☐
Podcast production, publishing and show notes	VA	☐	☐	☐

Email marketing and the list *The asset you own, as opposed to the ones you rent*

Adding, removing and cleaning subscribers	AUTO	☐	☐	☐
Segmenting the list by what people actually did	AUTO	☐	☐	☐
Writing and building the newsletter	VA	☐	☐	☐
Proofreading everything before it goes out	BOTH	☐	☐	☐
Welcome and nurture sequences after someone joins	AUTO	☐	☐	☐
Scheduling and sending campaigns	AUTO	☐	☐	☐
Reporting on opens, clicks and unsubscribes	AUTO	☐	☐	☐

Website, search and advertising

Website updates and content changes	VA	☐	☐	☐
Building landing, sales and opt-in pages	VA	☐	☐	☐
Plugin updates, backups, security and uptime monitoring	BOTH	☐	☐	☐
Keyword and competitor research	VA	☐	☐	☐
On-page search optimisation for new pages and posts	VA	☐	☐	☐
Monthly traffic and search reporting	AUTO	☐	☐	☐
Building and monitoring ad campaigns	VA	☐	☐	☐
Connecting up tools that do not talk to each other	AUTO	☐	☐	☐
Payment gateway and booking integrations	AUTO	☐	☐	☐

Delivery and operations *For anyone who quotes, schedules or ships something*

Turning an accepted quote into a job or work order	AUTO	☐	☐	☐
Scheduling and dispatching people to jobs	BOTH	☐	☐	☐
Replacing paper forms with capture on a phone	AUTO	☐	☐	☐
Timesheets, and routing them for approval	AUTO	☐	☐	☐
Job costing rolled up without anyone assembling it	AUTO	☐	☐	☐
Stock alerts and reorder points	AUTO	☐	☐	☐
Progress and delivery notifications to the customer	AUTO	☐	☐	☐

TASK	BEST BY	I DO THIS NOW	HAND IT OVER	NOT RELEVANT
Generating compliance certificates and documentation	AUTO	☐	☐	☐
Chasing suppliers and confirming deliveries	VA	☐	☐	☐

People *Small in volume, heavy in admin, almost entirely rules*

Job ads, applications and acknowledgements	AUTO	☐	☐	☐
First pass over CVs and candidate research	VA	☐	☐	☐
Interview scheduling	AUTO	☐	☐	☐
Contracts and offer letters from templates	AUTO	☐	☐	☐
Onboarding checklists and setting up accounts	AUTO	☐	☐	☐
Preparing training material and induction content	VA	☐	☐	☐
Leave requests and approvals	AUTO	☐	☐	☐
Certification, licence and insurance expiry reminders	AUTO	☐	☐	☐
Offboarding, and revoking access on the day someone leaves	AUTO	☐	☐	☐

Knowing what is going on *Replacing five reports nobody reads with one alert that matters*

Dashboards replacing hand-built spreadsheets	AUTO	☐	☐	☐
A weekly digest of the handful of numbers you actually check	AUTO	☐	☐	☐
Exception reporting — only flag what is wrong	AUTO	☐	☐	☐
Consolidating data across systems that do not connect	AUTO	☐	☐	☐
Research: statistics, trends, competitors, market	VA	☐	☐	☐
Theme and sentiment analysis across customer emails or reviews	AUTO	☐	☐	☐

What not to hand over

- **Judgement, relationships and bad news.** Price negotiations, difficult conversations, telling a client something has gone wrong. Automating these is how businesses lose people and accounts.
- **A broken process.** Automation makes a mess arrive faster. Fix the work first, then automate it, then staff what is left. That order is the whole point.
- **Anything that happens less than monthly**, unless getting it wrong is expensive. The build cost will never come back.
- **Anything sitting on unreliable data.** If the source is wrong, automation industrialises the error and removes the person who used to quietly catch it.

What happens with this

Everything you ticked in **Hand it over** gets scored: how often it happens, how long it takes each time, and how much work it is to build. The ones that hurt most, or that everybody hates, move up the list regardless of the arithmetic.

We build the top three in the first 90 days. Not the top ten. Three, finished and running, beats ten in progress — and the first one should be something you feel within a fortnight.