THE BUSINESS TASK DELEGATION CHECKLIST

Check the tasks you would love to take off your plate.

Inbox & Communication

- [ ] Sort and organize emails
- [ ] Draft or respond to routine messages
- [ ] Flag urgent messages for your attention
- [ ] Follow up on unanswered inquiries
- [ ] Maintain contact lists

Calendar & Scheduling

- [ ] Schedule meetings and appointments
- [ ] Send confirmations and reminders
- [ ] Coordinate availability with others
- [ ] Reschedule appointments as needed
- [ ] Keep calendars updated

Documents & Organization

- [ ] Format letters, forms, and documents
- [ ] Organize digital files and folders
- [ ] Enter or update spreadsheet information
- [ ] Prepare meeting notes and agendas
- [ ] Maintain templates and checklists

TIP: Check what drains your time, not just what you dislike.

MORE TASKS YOU CAN DELEGATE

Keep checking off the work you would rather hand over.

Customer & Business Support

- [ ] Respond to general customer inquiries
- [ ] Track requests and follow-ups
- [ ] Update customer or client records
- [ ] Prepare basic invoices or payment reminders
- [ ] Organize information for upcoming meetings

Research & Online Tasks

- [ ] Research products, services, or suppliers
- [ ] Compare options and summarize findings
- [ ] Gather information for business projects
- [ ] Update simple website or resource content
- [ ] Organize research links and references

Content & Social Media Support

- [ ] Draft or polish social media captions
- [ ] Create simple branded graphics
- [ ] Schedule approved social posts
- [ ] Organize content ideas and calendars
- [ ] Format and schedule newsletters

WHAT COULD YOU TAKE OFF YOUR PLATE THIS WEEK?

My top three tasks to delegate first:

1. _____
2. _____
3. _____

Learn more at lairdvs.com

Small steps. More breathing room.