OUTSOURCE ACCESS™
REDEFINING HOW YOU SCALE

What Can Offshore Talent Do?

A Glimpse into 6M+ Hours of Work across 85+ industries

Tasks performed across Marketing, Sales, Finance, Operations, Customer Service, and more.

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About Outsource Access

Outsource Access was founded in 2019 by Brad Strevens, a serial entrepreneur who discovered the transformative power of outsourcing when it saved his previous business from collapse. Recognizing the shortcomings of existing US-based outsourcing firms, Brad established Outsource Access to deliver the same life and business transformation that outsourcing brought to his company—but specifically designed for small and medium-sized businesses.

Our mission extends beyond traditional outsourcing. We exist to empower SMBs with the strategic advantage that Fortune 500 companies have leveraged for decades, making world-class talent accessible and affordable for businesses ready to scale.

Proven Track Record

Since our inception, Outsource Access has delivered measurable results for businesses across diverse industries:

- 6M+ hours worked by our dedicated virtual staff
- 85+ industries served
- 16M+ tasks completed with precision and reliability
- 700+ businesses supported in their growth journey

Top 7% of Fastest Growing Companies in the United States

We are also the recipient of recipient of 8 global or National Awards For Growth, Service Quality and Purpose

Key Benefits of Virtual Teams:

Cost Savings – Reduce overhead costs by 60-70% compared to hiring local employees.

Scalability – Expand your team rapidly without increasing fixed costs.

Expertise & Reliability – Highly vetted professionals trained in business best practices.

Seamless Integration – VAs work as an extension of your in-house team, following your systems and workflows.

Enhanced Focus – Free up leadership bandwidth by delegating routine but essential tasks.

Exponential Growth – Achieve higher efficiency and profitability with an optimized workforce.

About This Document

The following 700 tasks represent the breadth of capabilities available through strategic virtual staffing/outsourcing. Each task has been proven in real-world business environments, helping companies like yours achieve operational excellence while focusing on high-value growth activities.

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Admin Tasks

Email Management, Email Cleanup & Organization
Inbox Maintenance, Sorting Emails, Responding to Emails, Answering Q&A through Phone, Comments, and DMs
Outlook Calendar Management
Scheduling Events and Reminders
Calendar Management/Meeting Scheduling
Meeting Management, Organizing and Attending Regular Conference Calls with Stakeholders
Planning Travel, Creating Agendas, Sending Reminders for Homework, and Taking Meeting Minutes
Updating Contracts/Documents/Onboarding Documents
Business Documents Tracking and Organization
Documenting Standard Operating Procedures (SOP)
Creating and Maintaining an Onboarding Manual
Organizing and Maintaining Records (Client Database, Employee Documents, Policy Numbers, Claim Numbers, etc.)
Managing and Organizing SharePoint, Google Drive, and OneDrive
Docusign Documentation and Digital Signing for Employee Handbook
CRM Management, Data Cleanup, Merging Duplicate Records, Sorting & Uploading Documents
Uploading Documents to Teams from Google Drive
Client Folder Maintenance
Updating Jumbotron Slides and Slack Channels with Important Updates
Organizing Notes and Information Effectively
Extracting Data from PDF to Excel
Data Entry for CRM/Excel/Contacts Database
Matching Packing Slips with Invoices
Updating Inventory and Maintaining Data Records
Updating Purchase Order Tracker
Entering APs (Accounts Payable), Invoice Flagging, Invoice Payment Status Checking, Short Paying Invoices
Salesforce Data Maintenance
Categorizing Billing Subscription, Reviewing and Validating Customer Information
Validation of Drug and Alcohol Tests, LAB, and MRO Validation
Veterans Day Analysis Data Encoding
Weekly Metric Reporting, Location Administrative Support
Structuring and Managing Project Data, Overseeing Task Progress, and Ensuring Deadlines Are Met
Sorting Scanned Documents

Database Cleanup, Appending Records with Updated Data
Preparing Monthly and Quarterly Reports
Reviewing Reports to Identify and Address Discrepancies
Research and Information Gathering
Creating Step-by-Step Process Guides and SOPs
Creating Documentation on How to Use HubSpot and Zoom Info
Recipe Conversion, Nutritional Fact Checking, and Website Document Editing
Handling Purchase Orders, Shipment Verifications, and Internal Coordination
Managing Travel Arrangements
Supporting Recruitment, Onboarding, and Training Manual Development
Managing and Following Through with Zendesk Tickets
Managing and Recording Receipts for Financial Records
Responding to Emails, Setting Up CRMs, and Managing Documents
Organizing and Managing Short Tasks Assigned
Managing Employee Tax Files
Completing Forms Required for Business Operations
Managing the Setup of an Organized Cloud System and Documenting Procedures
Handling Purchasing and Tracking Tasks
Managing Updates to Project Fields
Organizing Meetings, Team Calls, and Rescheduling Based on Availability
Creating a Master Rate Grid for All Subcontractors
Researching Vendors and Managing Quotes for Materials and Appliances
Helping with Business Relocation

Customer Service

Responding to customer inquiries	Addressing customer inquiries and resolving escalations
Handling bid-related inquiries and scheduling times with companies	Addressing spam-related issues reported via Yahoo's complaint system
Answering and redirecting calls as needed, transferring them to the appropriate team member	Providing customer service by addressing common technical issues or inquiries regarding the mobile app and client portal
Assist in answering customer support tickets, managing customer service inquiries	Following up with clients to ensure payments are made and accounts are settled
Chat/Email assistance, inbound call volume assistance, taking scheduling/basic questions for homeowners	Communicating with clients through follow-up emails to maintain relationships and track customer satisfaction
Answer customer calls	Sending customer notices, replying to communications, and handling follow-up actions
Answering client inquiries and resolving tickets	Sending renewal emails and invoices to customers
Handling customer calls to ensure prompt assistance	Direct communication with clients to address inquiries and ensure satisfaction
Managing user access and password resets for the SL-Dog portal	Reaching out to previous guests to generate business or maintain relationships
Testing the functionalities of SL-Dog for bugs or issues	Encouraging clients to provide testimonials and leveraging these as advertising opportunities
Handling adjuster calls to confirm liability/coverage/limits	Engaging with customer feedback
Providing guidance on procurement-related inquiries	Engaging with customers to improve business visibility and reputation
Sending personalized thank-you cards and notes	Ensuring the recipient acknowledges receiving the demand letter
Forwarding customer-related alerts to the office for follow-up	Managing communication when discontinuing services with a client
Contacting insurance providers, responding to case managers	Handling automated booking and reservations
Addressing client concerns about shift changes or cancellations	Managing booking systems and scheduling appointments
Answering customer queries, advising customers on backorders or delays	Client management software & appointment setting
Responding to customer reviews on Google	Collecting customer feedback through surveys to improve service quality
Respond to customer reviews	Managing relationships with radio/TV personalities who endorse products
Managing customer service tickets and resolving issues	Managing member inquiries
Organizing and responding to client and team emails effectively	Handling procurement of business insurance and managing related tasks
Ensuring accurate time tracking and following up with team members	Securing hotel accommodations for business-related travel or events
Tenant relations and survey	
Contractor relations and survey	

Executive Assistant

Organizing and managing events
Engaging and managing a group of participants
Ensuring participation and experience are positive
Email management, leads management
Email and calendar management, weekly insights prep, podcast prep, webinar follow-ups
Google Calendar sync, email management, data entry
Scheduling and calendar management, email management, document preparation, appointment reminders
Pre-planned travel arrangements, calendar management/meeting setup
Daily email cleanup and calendar snapshot, take over company calendar
Monday.com process documentation
Executive-level support for internal updates and task tracking
Networking coordination, team communication, problem-solving
Monitoring candidate progress and processes
Reviewing the company calendar daily
Creating calendar appointments
Organizing and saving critical reports for easy access
Organizing and executing the design of new office spaces
Business development coordinator
Gathering information, checking schedules, and coordinating key projects
Managing CRM, coordinating gift-giving events, and ensuring follow-ups
Providing direct support to the client by managing communication and ensuring efficient use of time
Uploading receipts to designated locations
Assisting in generating accurate and detailed quotes for procurement or service-based projects
Assisting in calculating and updating Statements of Work (SOW) for clients and vendors
Creating strategies and tracking progress toward yearly sales goals
Developing a comprehensive presentation or guide for a new pitch

Calendar management & email management
Managing multiple email accounts (Gmail, Office 365, Yahoo)
Calendar management, appointment setting in Calendly
Being mindful of the calendar & reminding the team
Docusign and document creation, Adobe, SuperNova agenda updates, client information gathering
Calendaring, expense reports, DocuSign, data entry, email follow-up, and CheckBox.com for data submission
Onboarding new clients, creating client list for unposted transactions
Opening new accounts
Phone coverage, SuperNova courtesy calls, contact third-party companies
Assistance with complex schedule, SuperNova Scoreboard Meeting
SuperNova Scoreboard Meeting, Service and Planning Team L10, managing and supporting online service offerings
Scheduling travel for speaking engagements, coordinating with contacts for upcoming talks to manage logistics
Coordinating travel for other team members
Updating speaking schedules on DJF website
Managing and scheduling meetings
Investor meeting and agenda management
Help organize events, create PowerPoint (72-Month DMP)
Manage travel for family, employees, and fishing excursions, email management, daily updates
Book restaurant reservations
Organizing business events like fundraisers, conventions, and networking events
Assisting with planning and coordination of events, including scheduling, logistics, and follow-ups
Assisting with making reservations for events or dinners
Returning voicemails
LinkedIn research and invites, KAYO Outreach lists – data entry and draft email template
Conducting research, building CRM databases
Managing and implementing strategic promotions

Finance

Business Invoicing, Email Management, Business Vendor Management	Sales Team Deals Report
Processing Weekly Payroll	Financial Oversight for Gift Certificates
QuickBooks Bookkeeping, Email Management	Invoicing and Receipts, Adding Expenses (Job Costing) in Salesforce, Bi-Weekly Payroll
Bank Account & Credit Card Reconciliations, Entering Receipts	Invoicing for Projects and Clients, Daily Bookkeeping
Overseeing the Expensify account and ensuring receipts are properly attached	Accounts Payable & Receivable Processes
Payroll Approval from QuickBooks, Invoicing	Creating Purchasing Processes, QuickBooks Cleanup, Cash Flow Monitoring
Monthly Bank Reconciliation	Paying Bills, Creating and Managing Sales Quotes and Sole-Source Agreements
General Bookkeeping and Data Entry/Verification	Coordinating and Updating CSQ Investor Portal and CRM
Accounting (Enter Bills to CRM)	Creating Financial Quotes or Proposals for Clients
Run Unpaid Bills Report	Ensuring Expensify Charges Have Necessary Receipts and Are Processed on Time
Financial Documentation and Vendor Payments	Validating Purchase Order Matches Invoices
Budget Management, Accounting	Assist with Procurement-Related Financial Documentation
Basic Bookkeeping, Expense Tracking	Process Vendor Invoices & Credit Notes
General Bill Entry, Accounts Payable, Accounts Receivable	Comparing Direct Cost and Project Expenses Master Lists
Running Reports on Marketing ROI, Auditing Invoices, Analyzing Financial Data	Monitoring Daily Logs and Photo Updates for Projects
Generating Customer Invoices & Processing Customer Payments	Managing Dashboard, Keeping Track of Critical Project Milestones
Assisting with Evaluating Interest Charges	Sales Energy Scorecard Project
Setting Up New Customers and Vendors	Invoice Auditing
US Business Tax Returns, Property Management Bookkeeping, Cash Flow Projections	Billing Disputes and Adjustments
Personal Financial Statements, Consolidated Loan Tracker	Payment Reconciliation
Taking Over QuickBooks, Auditing Vendor Paperwork, Weekly Subcontractor Payroll Process	Time Tracking and Verification
Bank Reconciliation, Checking Balance Sheets of All Accounts	Communication with Clients: Sending Payment Reminders and Resolving Billing-Related Inquiries
Accounts Payable/Receivable Recording	Coordination with Facilities
Recording and Verifying Transactions, Preparing Financial Statements	Accounts Receivable & Payable Working Paper
Payment Processing and Updating Payment Details	Processing Credit Card Payments, Reconcile Credit Card Receipts in QBO
Revising and Improving Financial Agreements, Verifying Order Details	Updating Credit Card Monitoring Sheet
Analyzing Financial and Operational Data	Cash Flow Report Assistance
Maintaining a Structured CRM Database for Financial and Customer Tracking	Entering and Managing Data Across Multiple Platforms
Following Up on Past Due Invoices, Entering Bills and Sending Payment Reminders	Tax Preparation, Monthly Bookkeeping, QuickBooks Online Accounting, Bank Reconciliations and Financial Report Generation
Checking Eligibility for Employees to Enroll in 401k Plans	Saving POFs (Proof of Funds), BOLs (Bills of Lading), and Filing Documents
	Price Sheet Management
	Purchase Orders/Change Orders, Updating Bid Tracking Checklist

Preparing and Sending Questionnaires to Clients for Data Collection as Part of the Tax and Financial Preparation Processes	Overseeing Monthly Billing Processes
Handling Financial Agreements and Maintaining Compliance	Processing AP Invoices, Creating Weekly Vendor Payments
Accounts Receivable Process and Plan, Accepting Payments, Generating Sales Reports, Sending Weekly Invoices	Reviewing Employee Expensify Reports for Accuracy
E-commerce Orders to CRM, Audit of Catering Orders, Track and Audit Time and Attendance, Reconfirming EZCater Orders	Posting Journal Entries, Reviewing General Ledger, Reviewing Monthly Reports
Business Accounts Payable/Bookkeeping, Personal Accounts Payables	Handling Financial Tracking for Client Work and Expense Management
Reviewing Problem Invoices Workflows	Updating Backlogged Financials, Running Bi-Weekly Payroll, Invoice Entry, W9 Entry
Sedona (Bank Reconciliation), Catch-Up & Clean-Up Books of Account, GL Reclassification and Adjustment from Misposting Transactions	Projection Plan Task, Update Lease/Agreement Task
Creating & Posting Accounts Receivable Payment Processing, Creating & Posting Accounts Payable Bills Payment	Managing Payroll Computation, Store Financial Calculator Task
Billing Claims	Adding Monthly Data for Certain Stores, Reviewing Operational Details for Multiple Stores
Invoice Management	Recording and Managing Change Orders
Processing Payroll for Sponsors	Ensuring Proper Entry of Client, Vendor, and Subcontractor Information
Wage Garnishment	Job Costing, Installment Payment, Payroll, Profit Share Calculation
Handling the Processing and Disbursement of Retention Bonus Payments	Enhancing and Automating Bookkeeping and Accounts Payable Processes
Payroll Processing, Deposit Tracking and Payables Requests	Active Project Accounting Verification
Direct Cost/Commitment Payments, Check Run Reports, EOM Close Out for Accounting	AP Invoicing and Validation
Performance vs. Budget Reporting, Preparing and Managing Budgets	
Account Reconciliation, Ensuring Timely Receipt of Payments	
Project Time & Expense Entry & Verification	
Entering Credit Card Expenses (Overhead, Vendors Prepaid, Project)	
Reviewing Credit Card Transactions from Bank, Expenses Verification/Approval	
Timesheets Verification/Approval	
AP Payment Process, Reconciliation to Vendor Statements, AP Invoicing	
Managing Credit Card Transactions	

IT & Systems Management

Managing Database and Providing Reports
ZOHO Implementation
TPP Program Management, Company/team task tracking
AutoCAD Design
Generate High-Level Renderings and 3D Walk-Throughs
Take Existing Drawings and Input Into Revit
Pick Up Red Marks on Construction Documents
Reproduce Construction Documents on Repeatable Jobs
Update Operational Dashboard

Lead Generation

Capturing Business Card Info, CRM Cleanup, Documents Creation and Presentation
Client Follow-Up & Task Management
Following up with clients regarding estimates
Encouraging clients to vote for One Day Floors
Researching businesses or establishments online to identify potential targets
Update List of Prospects for 1 N Federal
Researching Acquisition Targets
Researching, gathering quotes, negotiating contracts with media outlets, and ensuring the quality of vendor services
Finding Unarmed Security Officers and Future Lending Partners
Finding Contractors for Construction Jobs
Research List of Grass Cutting Companies
Prospecting and Leads Generation, generating qualified leads for sales outreach and follow-up
Lead Generation and Qualification
Sending initial cold emails to potential leads
Reviewing Tradeshow Journals - Generating Leads
Checking Houses for Rent, Researching Marketing Companies
Entering and Managing Lead Data in ServiceTitan
Compiling a List of Competitors
Creating a List of Landscapers, Sending Marketing Emails, Setting Up Meetings
Lead Qualification Intro Calls, Lead Generation
Lead Details Research
Prospecting, Importing Contacts to HubSpot
Data Mining and Leads Generation
Organizing and Maintaining the CRM Database
Preparing Updates for Preconstruction Activities and Leads
Researching Target Companies, Office and Industrial Tenants with Expiring Leases
Researching Business Leads and Market Data
Researching Contact Information, Utilizing ZoomInfo
Data Mining for Industry Target Lead Generation & Tracking
Running e-manage Leads & Booking Reports
Salesforce Lead Flow
Creating Lists of Local Realtors and Designers
Marketing List Research
Copper Research/Entry
Building awareness of additional services through email campaigns and phone calls
Database Research and Management
Lead Generation via Apollo.io
Inside Sales

LinkedIn Research and Invites, Sending Connect Invites on LinkedIn
Fundraising, Sales Funnel Process
Franchisor Outreach and Engagement
Marketing Post for FB, IG, LinkedIn
Research of Prospects, Reaching out to Leads
Conducting Research to Support Lead Generation and Projecting Sales Opportunities
Research Projects, Project Management Software Investigation
Lead Database Creation
Identifying Leads and Ensuring Timely Follow-Up to Nurture Prospects
Prospecting, Cold Outreach, Meeting Coordination for Clients
Keeping the Copper CRM Updated with Current Leads, Projects, and Other Relevant Data
Tracking the Status of Leads and Ensuring Proper Follow-Up and Reporting of Leads
Overseeing and Executing the 33 Touch System (CRM)
Generating leads from targeted marketing campaigns
Extracting leads from emails and forms and organizing them into Mailchimp or other CRMs
Managing new referrals, starting encounters, and assigning them to intake personnel
Website Contact Requests and Referrals
CRM Management
Build and organize a list of all LPNs and RNs emails
Build a list of Missouri and Metro-east Illinois schools (health schools)
Build a local, in-person, and virtual job fair list through 2024
Build a list of nurse networking and job placement opportunities
Conducting timely lead outreach and follow-up to convert new leads and upsell current guests
Assisting with Lead Generation, Lead Management
Search for Leads in Contact Databases
Identifying and extracting leads from contact databases and capturing them in Excel for future outreach
Targeted outreach campaigns to generate leads and create marketing opportunities
Gathering account-based marketing (ABM) contacts to align with marketing strategies and campaigns
Supporting sales and marketing campaigns by identifying potential clients and populating lead databases
Adding and updating lead information into the CRM system
Updating the email marketing database for lead outreach
Managing paid campaigns to attract and convert leads
Contacting existing customers to update records, educate them about other services, and survey their needs
Warm suspect follow-up
Scheduling customer technology business reviews
Reaching out to engaged prospects to gauge interest and gather information
Identifying new business opportunities during customer reviews

Marketing

Website Content, Adding Contacts to Gmail, Organizing and structuring data
Engaging with the audience by answering questions, managing feedback, and fostering community engagement
Managing relationships with radio/TV personalities who endorse products
Managing event registrations for clients or customers
Graphic Design for PowerPoint Presentations
Social Media Analytics
Client Endorser Management
Content creation, Photo editing
Video Creation, Coordinating podcast episodes
Managing the traffic of ads
Generating Annual Media Outlet Campaign Schedules
Create Video Compilations for Educational Purposes
Create and manage e-mail blasts
Social Media Management and Content Creation
Designing Promotional Materials
Planning and managing LinkedIn posts
Blog Posts for Marketing
Email Marketing
Newsletter creation and framework
Marketing outreach strategies for potential new partners
Social Media and Digital Promotions, PR Initiatives
Strategies for Social Media and PR, Email Campaigns and Direct Mail
Developing engaging content and ensuring a professional and appealing product
Managing and scheduling promotional campaigns
Flyer and Marketing Materials Design, Creating Email Campaigns, Social Media Management, Advertising
Marketing Campaign Management
Advertising and Sales, Creating Ads
Managing Speaking Opportunities, Including Following Up with Leads, Drafting Contracts, and Coordinating Travel Arrangements
Social Media Management, Writing Meta Descriptions for CultureWise Website
Provide Assistance with Various Marketing Tasks as Needed to Execute Campaigns and Outreach Strategies
Media Engagement, Social Media Management, Google Business Profile Update
Poster Making and TV Slide Video Creation, Updating and Managing Business Profiles
Assist Marketing, Supporting Social Media Posting Efforts, Working With a Graphic Designer for Content
Schedule Social Media Posts
LinkedIn Marketing - Recruitment
Drafting and distributing newsletters

Exploring advertising or content opportunities to increase visibility in healthcare media
Planning and managing marketing campaigns
Helping to progress the marketing plan
Research | Organization List, Product Mockup
Establish social media accounts, acquire social media followers
Using online groups to promote "office hours" and increase visibility among potential clients
Identifying opportunities to speak about the impact of divorce on children and ethics to position the client as a thought leader
Engaging directly with the community to offer free legal advice, build trust, and attract clients
Coordinating efforts to connect with attorneys in PowerCore for potential collaboration or networking opportunities
Marketing dribble campaign for realtors & designers
Outreach marketing – Arizona Book of Lists
LinkedIn management
Creating an email drip campaign
Creating mechanisms for social media follow-up
Assembling client info and photos
Personalizing letters for outreach marketing
Consignor follow-up drip campaign
Requesting referrals and testimonials
Managing ads and email campaigns
Optimizing website content
Improving website functionality and user experience
Maintaining email lists by removing unsubscribed contacts
Social media content creation
Developing a social media marketing strategy
Community management and engagement
Video editing and production
Graphic design and visual content creation
Social media analytics monitoring
Scheduling social media posts
Marketing assistance
Website management
Overhauling the CRM and integrating HubSpot
Social media data entry
Reviewing and reconciling credit card transactions
Identifying and resolving errors in social media accounts or campaigns
Reviewing the setup and configuration of tags
Creating a marketing campaign to recruit participants
Developing marketing campaigns
Updating and redesigning social media profiles and websites
Organizing tasks to raise awareness and ensure engagement for upcoming events

Video Editing
Producing ebooks, creating landing pages, and generating email lists
Posting job ads
Marketing Plan Creation
Website Updates
Social Media Calendar & Posting for AGENCY and Goodstock
Overseeing brand guidelines, landing pages, and promotional materials
Targeting potential participants for the virtual mastermind group
Generating leads and interest for virtual and live events
Combining paid campaigns with sales efforts to convert leads into customers
Engaging in Social Media, SEO, Create Content Ideas and Assign to Employees
Overseeing the firm’s rebranding efforts
Developing and leveraging opportunities for client engagement and marketing through podcasts and in-person events
Creating and maintaining marketing content using digital platforms
Editing videos to create engaging marketing materials
Goodstock Blog Posts based on Existing Academic Research
AGENCY Self Care Book Content Creation
Develop and execute a comprehensive social media plan
LinkedIn & Social Media Strategy
Managing paid campaigns on platforms like Google and Facebook to generate leads

Operations

- Property Measurement Initiative
- Racing Travel Planning/Tracking, Daily Landfill Load Check
- Managing project updates and data organization
- Streamlining New Clinic Opening Process, Creating and Managing Scalable Processes
- Managing and logging project design and PA details
- Setting up new jobs and agreements
- Managing and tracking change orders
- Updating installation schedules
- Entering bills in QuickBooks
- Weekly payment reports for PMs
- Creating purchase orders in BT, Logging receipts in the spreadsheet
- Providing project tracking tools
- Reviewing accounts receivable lists
- Creating customer orders
- Mapping out store locations
- Preparing reports on salon bonuses, Contributing to financial incentives planning
- Entering and reviewing data related to revenue projections
- Analyzing product sales data by location, Providing insights for sales optimization
- Salon Appointments and Feedback
- Marketman Inventory Management
- Planning and coordinating tasks for launching new business locations
- BuilderTrend - CRM and Project Management
- Setting up and maintaining social media accounts
- Tracking and Managing Weekly Tasks
- Organizing and Managing Veteran-Related Data
- Managing the Transition of Email Marketing Systems to Simple Success for Improved Functionality and Performance
- Auditing and Tracking Outstanding Client Projects and Tasks to Ensure Timely Completion
- System Implementation
- Managing Tasks or Processes Under the "Morning Advantage" Program to Improve Daily Operational Efficiency
- Creating SOPs on Managing Client Work, Email, and Business Development
- Organizing Tasks, Schedules, and Priorities for Improved Efficiency
- Managing lead intakes from referral sources
- Learning Litify and entering new cases
- Service Purchasing, Quote Conversion Emailing
- Processing Purchase Orders Via Phone Call
- Managing encounters and tasks related to referral sources
- Monitoring Documentation
- Process Mapping
- Company/team task tracking, Data Entry, Managing schedules
- Updating sales logs, Creating install reports, Cleaning up duplicate entries in the CRM
- Creating Weekly Huddle Documents, Minutes of Meeting Creation
- Sending Pre-Construction Email Series
- Supporting administrative website updates requiring attention to branding compliance
- KPI Tracking for Meineke and Janitorial Services
- Operational Blueprint, Capturing and organizing equipment photos
- Calculating dimensions of equipment for logistical planning
- Assembly of documents and tracking processes
- Timesheets Tracking, Creating T&M Invoice
- Tracking purchase orders and updating records
- Change Orders Status Reporting, Estimating/Takeoffs
- Monitoring Crew Hours, Submitting Requests for Updated Certificates of Insurance
- Running Project Manager Meetings, Ensuring accurate setup of client, vendor, and subcontractor information
- Permitting/Design/Selections/Survey Tracking
- Process Review, Creation & Documentation
- Researching new properties, Tracking key performance indicators
- Reviewing corporate accounting records
- Monitoring and ensuring smooth functioning of a Management System
- Keeping track of KPIs
- Planning and executing events to build and maintain strong client relationships
- Managing information system updates
- Tech onboarding for new hires
- Conducting in-depth research on various topics to support strategic initiatives
- Managing the extensive rebranding project
- Development of a PowerPoint-like Presentation for Intake
- Managing Cooperative’s online profiles
- Expanding social media ads and managing the company’s online reputation
- Ensuring Health & Safety Compliance
- Contributing to Lean initiatives and ongoing process improvement
- Acting as the internal expert on the Hive system
- Monitoring overdue tasks and resolving issues
- Ensuring the CRM has complete and accurate data
- Monitoring campaigns and tasks within Hive
- Identifying and fixing delays in client work
- Overseeing and improving operational efficiency
- Monitoring compliance with Arkansas regulations
- Managing and auditing HR systems
- QuickMar (Medication Management) Audit

Procurement Support

Finding contractors for construction jobs
Business Vendor Management
Tracking invoices from vendors
Finalizing Agreements and Contracts, Ensuring All Details Are Accurate and Properly Executed
Ordering parts/equipment, tracking shipments, confirming delivery, and setting installation appointments
Office Supply Ordering
Printing and Ordering Marketing Materials
Procurement Support, Vendor Coordination
Ensuring procurement data is accurately incorporated into pricing models
Coordinating requests and ensuring instruction manuals are up-to-date
Researching and negotiating with vendors for better services and terms
Gathering vendor information and compiling an organized list for operational efficiency
Verifying Shipping Documents, Sourcing dimensions and details for various equipment components
Updating Vendor/Subcontractor List, Outstanding Bid Follow-Ups
Bidder Status Report, Managing Change Orders on Projects
Quote Conversion Emailing
Handling supplementary purchases
Service Authorizations
Supplier order confirmation
Backorder releasing and updating open POs
Demo/Van Stock Report Generation and Adjustments
Setting up product codes
Customer order processing and follow-up
Coordinating and managing sales order workflows
Processing basic quotes
Quoting on simple products and parts
Coordinating with vendors or suppliers for pricing and scheduling quotes
Drafting service agreements and quotes
Managing quote approvals and facilitating the sales process
Uploading signed quotes/email approvals and converting them to sold
Creating and voiding quotes/opportunities

Project Management

Procore Management
Acculynx Audit & Efficiency
Acculynx Proposal/Presentation Set-Up
Salesforce Project Audit
Implementing and managing the new CRM system for improved operational efficiency
Overseeing project management tasks, Develop Processes and Systems
Project Management (Quotations, Data Entry, POs, Proposals, Release, Modifications)
Preparing Tour Books, Add All Constant Contact Activity to Corresponding Project Activities
Tracking key performance indicators

Recruitment

Screening resumes and shortlisting candidates for potential hires
Managing Screening/Tracking of Job Applicants
Supporting recruitment efforts, including job postings and candidate evaluations
Posting job ads (Indeed, social platforms)
Conducting pre-screening calls and interviews
Setting up and managing interviews
Onboarding employees (verifying documents, orientation, and reference checking)
Background and drug screen registration
Managing job costing, time tracking, and HR tool administration
Handling data management related to human resources
Subcontractor and vendor vetting
Finding contractors for construction jobs
Supporting recruitment, onboarding, and training manual development
Hiring and training new key staff for BCS locations
Sales agent recruitment
System implementation (Salesforce), Recruitment Material for Agencies
Creating organizational tools to track HR metrics
Compensation band research and review
Keeping hiring managers updated on candidate progress
Monitoring and tracking applicant progress, meeting weekly hiring milestones
Documenting interview information and moving candidates through the process
Developing and documenting efficient processes for sourcing and hiring
Supporting HR initiatives by monitoring employee engagement platforms

Sales

CRM Management (Pipedrive, Notion, ClientLook, ATLAS)
Updating and managing the sales pipeline
CRM Database Building – Data Entry
General term sheet and contract support
Preparing and creating sales orders and maintaining sales logs
Processing and tracking sales orders
Client Endorser Management
Client Services Support
Appointment Setting, Outbound Sales Calls, and Follow-ups
Sending Emails to Prospect Leads, Email Outreach (Brokers/Banks)
Coordinating Follow-Ups from Email Campaigns
Reaching out to potential clients
Weekly Sales Forecast and Progress Report, Monthly Sales Summary Report
Sales Energy Scorecard Project
Sales Pipeline Management
Reporting on sales and performance metrics for the team
Comparative Market Analysis
Listing Management & Coordination
Managing vendor location expansion and contract execution
Ensuring sales jobs are properly closed, including permits and invoicing
Finalizing and securing sales contracts
Collecting & Assigning Sales Leads
Client Journey Analysis
Managing the Buyer and Seller Journey From Onboarding to Closing
Identifying and Segmenting Target Audiences for Better Outreach
Tracking hiring progress and KPI achievement
Coordinating outreach and composing email templates
Reviewing client contracts
Checking emails and following up with clients on outstanding matters
Organizing lists in CRM or Google documents
Updating folders and navigating SharePoint efficiently
Entry of customer orders into Exonet
Preparation of recurring monthly reports and specific data
Tracking renewals and generating quotes
Managing and tracking new referrals
Providing direct client support, ensuring efficient communication and time management
Organizing and storing insurance information
Researching and acquiring police reports for claims
Setting up new cases in Practice Master
Daily Billing and AR Management

Sales & Marketing

CRM Management (HubSpot, LinkedIn Navigator, Pipedrive, ClientLook)
Sales Pipeline Management & Operation
Managing and tracking sales leads, follow-ups, and appointments
Sales Tracker & Marketing Web Leads Funnel Report
Managing email and calendar for sales and marketing teams
Lead Data Entry & Organization
Managing client shift schedules
Tracking and documenting the progress of technology business reviews (TBR)
Reviewing and analyzing weekly key performance indicators
Managing and streamlining project updates and data organization
Preparing presentations that align with sales and marketing objectives
Collaborating with sales to support marketing materials or activities
Business Development & Maintaining Operational Processes
Planning and managing marketing campaigns
Marketing Plan Creation
Generating Annual Media Outlet Campaign Schedules
Trade Show Planning/Strategy, Managing exhibitor services & booth readiness
Utilizing CRM systems to generate and manage leads from tradeshows
Organizing educational events for interior designers and architects
Helping to earn and retain core customers
Gathering insights on market trends and competitors
Conducting research and applying SEO practices
Website Setup & Management (WordPress, HubSpot)
Creating and distributing newsletters for email marketing campaigns
Social Media Management & Engagement (Facebook, LinkedIn, Instagram, Twitter)
Content Creation, Copywriting & Blog Posts
Print and Media Marketing (Canva), Graphics and Layout for LinkedIn
Social Media Content Posting, Marketing Material Design
Creating newsletters for email marketing campaigns
Craigslist Posting, Non-Profit Marketing Emails
Market Research, Billboard/TV/Radio Trafficking
Direct Mail Strategy & Alternative Social Media Sites Management
Creating and Uploading Short-Form Videos for Branding

Video Editing & Enhancing for Social Media
Monitoring upcoming renewals to ensure timely actions
Managing proposals related to the Dynamik project
Managing email & appointment setting
Handling customer service-related meetings with clients
Managing and tracking marketing and sales workflows
Support Ticket Creation, Reporting App Bugs, and QA of Client-Facing App
Completing and Submitting PCI Compliance Surveys
Reviewing backups for failures and creating tickets
Managing the Billing Platform
Dynamic Price Grid & Inventory Updates
Organizing and sending reports to necessary parties
Advertising Backend Management
Monitoring and updating tenant scheduling processes
Managing offshore bookkeeping teams

Explanation: See below an example of a completed "2 Question Exercise" Template from a Client. All the confidential information has been removed but it will give you a sense of how yours may look once completed.

Person Reporting	Cateogry (Currently Doing or On the Radar)	Department	Item	For "Currently Doing" tasks, list the estimated monthly hours spent on the task.
Jeff Smith	Currently Doing	Account Management	Capturing client logins for all key platforms	5
Jerry James	Currently Doing	Accounting	Email and call reminders to clients to pay bills	4
Anna	Currently Doing	Marketing	Building emails	30
Anna	Currently Doing	Marketing	Adding content to the website	20
Anna	Currently Doing	BDR	Identifying accts and contacts for prospecting	120
Anna	Currently Doing	GM, PAC	Triaging emails and organizing meetings	20
Anna	Currently Doing	CS	Explaining how to set up filters, running reports, etc	6
Julie Johnson	Currently Doing	Operations	Copy and paste to create metrics dashboard for CEO	2
Noemi	Currently doing	Pro Services	Content development	12
Noemi	Currently Doing	Pro Services	Delivery framework	15
Noemi	Currently Doing	Pro Services	Project management	12
Noemi	Currently doing	Pro Services	Data visualization	10
Peter	Currently Doing	Tech	Non-leader software development (~40% staff)	14
Peter	Currently Doing	Tech	Application QA (~50% staff)	14
Peter	Currently Doing	Tech	Non-leader Customer Support	20
Peter	Currently Doing	Tech	IT Help Desk, Asset Management	25
Peter	Currently Doing	Tech	EHR Integration Implementations (~70% staff)	20
Peter	Currently Doing	Tech	RFP writing, Job descriptions, learning content	15
Julia	Currently Doing	Product	Administrator for Aha!	2
Timothy	Currently Doing	Acccounting	AP and A/R / Bookkeeping	24
Jessie Reed	On the Radar	Marketing	Blog Writing	n/a
Anna	On the Radar	CS	Keeping customer contacts up to date	n/a
Anna	On the Radar	CS	Proactive outreach and value add (non-TT accts)	n/a
Lisa	On the Radar	PeopleOps	Candidate Sourcing	n/a
Peter	On the Radar	Tech	IT Ops	n/a
Peter	On the Radar	Tech	Data science/engineering	n/a
Peter	On the Radar	Tech	Grunt work	n/a
Peter	On the Radar	Tech	UI/UX	n/a
Peter	On the Radar	Tech	Delivery team if we declare a product EOL or maintenance only	n/a
Peter	On the Radar	Tech/CS	Building presentations	n/a
Julia	On the Radar	Product	US Health care policy watch / government affairs	n/a
Julia	On the Radar	Product	Technical writing - documentation and Help Center content	n/a
Julia	On the Radar	Product	Deep Competitive Intel	n/a
Julia	On the Radar	Product	More time with customers and time with thought leaders in the market	n/a
Julia	On the Radar	Product	Data Scientists to explore new data and analytics offerings	n/a
Julia	On the Radar	Product	Pricing and packaging research	n/a
Timothy	On the Radar	All	Reviewing bounced emails identifying new contacts	n/a
Timothy	On the Radar	Marketing/Rev Ops	Salesforce clean up and build out (de dupping accounts, adding accounts/contacts, NPI assignment/rollup)	n/a

Not sure where to begin with outsourcing? Start by doing this yourself and simply emailing your staff to take 30 minutes and brainstorm their responses to the two questions below and to email them back to you. See below some example responses:

1. What are you "Currently Doing" that you feel is not the best use of your time? List the task and provide a rough estimate of how many hours each month you spend on this task.

2. What are things "On the Radar" you WANT to be doing or think we SHOULD be doing to add value to the company that we are not getting to typically due to time, money, resource or knowledge constraints?

Here is a grid where you can consolidate all responses with example inputs below. See "example" entries below you can delete.

Person Reporting	Cateogry (Currently Doing or On the Radar)	Department	Item	For "Currently Doing" tasks, list the estimated monthly hours spent on the task.
Jane Smith	On the Radar	Marketing	Blog Writing	n/a
Bob Evans	Currently Doing	Account Management	Capturing client logins for all key platforms	5
Jeff Reeder	Currently Doing	Accounting	Email and call reminders to clients to pay bills	4
Julie Johnson	Currently Doing	Operations	Copy and paste to create metrics dashboard for CEO	2