



BOOST YOUR PRODUCTIVITY

100 Tasks an Executive Assistant Can Do For You

What is an executive assistant?

Executive assistants handle important day-to-day responsibilities for you and your company. They also take on special projects and one-off tasks. A full-time EA can free up around 40% of your work week. With extra time, you can finally focus on the most important challenges in your life and career. A great EA will learn your unique workflow, will start to fix problems before they occur, and will adapt on-the-fly to big changes.

What can an executive assistant do for you?

More than you'd think. EAs are responsible for important tasks that need to be done every day (like replying right away to all incoming messages in all inboxes). They get errands done for you and your family and kick start any personal project you've been meaning to start but have never had the time to do.

With training and the right tools, they can even take on more complex responsibilities, such as running a website, social media marketing, and overseeing your online store. In this ebook, we've compiled 100 tasks you can delegate to an executive assistant—and that's just to get you started.





Administrative and Clerical Work

Administrative tasks drain time in every organization. A smart EA cuts this waste by automating repetitive work and building out a new clear and organized process. They don't just manage admin—they eliminate it whenever possible.

1. Schedule meetings. Invite attendees, and reserve venues as needed.
2. Remind you of important tasks, appointments and deadlines.
3. Make reservations and manage suppliers for office parties, training, or other events.
4. Take down minutes of meetings and fix AI-generated meeting note summaries.
5. Schedule medical appointments and fill out intake forms.
6. Liaise with staff, suppliers, contractors, and clients.
7. Screen emails, and then forward messages to the right team member.
8. Summarize or annotate audio or video files.
9. Convert, merge, and split PDF files.
10. Sort and update files, and clean up archives or databases.
11. Transcribe or convert files from one format to another.
12. Format documents or forms in official company templates.
13. Process employee paperwork.



Personal Assistance

If a task can be done quickly by your assistant, it's better to delegate it right away—giving you more time to focus on what matters most. Just send it to your EA!

14. Organize your to-do list.
15. Respond to emails and messages on social media.
16. Serve as receptionist, receiving and making calls.
17. Manage your voicemail, summarizing or transcribing messages.
18. Reschedule meetings or appointments when plans fall through.
19. Make restaurant reservations.
20. Transcribe audio voicemails, videos or audio clips, podcasts, etc..
21. Update your phonebook with addresses, contact details, best time to contact, etc.
22. Book tickets and hotels for trips, and make other needed reservations.
23. Prepare travel itineraries.
24. Pause newspaper, mail, and other subscriptions while you're traveling.
25. Handle banking transactions, like paying bills and making bank transfers.
26. Hire cleaning or repair services.
27. Call stores to get prices, confirm stock, or get other information.
28. Speak with customer service reps or tech support on your behalf.
29. Purchase gifts and send greeting cards.





Project Management

Have a lot on your plate? Let your EA stay on top of all your projects for you.

Your EA will monitor the progress of each project for you, making sure everyone involved is on track to hit their goals.

Here are some specific ways they can help you stay on top of all your projects:

- 30. Create project kanbans or task trackers and invite team members.
- 31. Create a project roster with the roles, addresses and contact details of team leads.
- 32. Follow up with project leaders on deadlines or deliverables.
- 33. Serve as a point of contact between you and your team members.
- 34. Manage contractors and suppliers.
- 35. Prepare weekly status updates on ongoing projects and pending deliverables.
- 36. Track and report on KPIs.
- 37. Create documentation on workflows and processes.





Bookkeeping, Databases and Research

EAs can be especially helpful when it comes to organizing and managing data. This is important work that needs to be done regularly and accurately. Don't try to do this all yourself! This includes bookkeeping, archiving, and fact-checking.

- 38. Organize receipts and invoices.
- 39. Conduct research to fill out missing details in databases.
- 40. Sort, and input data into CRMs, balance sheets, or other databases.
- 41. Organize files in Dropbox, Google Drive, or local storage systems.
- 42. Enter and clean up data on your CRM.
- 43. Verify or update client information in your CRM.
- 44. Maintain and back up online customer records.
- 45. Implement data privacy protocols when handling customer or employee information.
- 46. Fact check research or verify database entries.
- 47. Maintain product catalogs, digital archives, and other file collections.





Social Media and Marketing

Your EA can help you grow your online presence. Sure, your EA won't be able to create and post content the way you do, but they can handle the important administrative work that piles up when you are active on social media.

48. Set-up accounts on social networks such as Facebook, Twitter, LinkedIn, Youtube, etc.
49. Curate posts to share from other blogs, websites or social media pages.
50. Schedule posts on social media.
51. Participate in forums or message boards to increase credibility or engagement.
52. Moderate and reply to comments on your blog.
53. Update social media pages with company profiles, contact info, and links.
54. Research for blog posts, newsletters or other articles.
55. Schedule or publish blog posts from drafts.
56. Compose documents from handwritten drafts, faxes, or dictations.
57. Copyedit or proofread drafts.
58. Check blog or other web content for plagiarism.
59. Seek out, apply to, and help prepare for speaking engagements.



Customer Management

Have your EA handle the first point of contact to your customers and clients. With an EA, you become super-responsive and always reply professionally on-time.

- 60. Follow up with clients/customers.
- 61. Remind clients of overdue payments.
- 62. Take care of refunds and customer complaints.
- 63. Set up autoresponders (Aweber, Mailchimp).
- 64. Assist in live webinars by taking attendance, managing live chat, and so on.



Personnel Management

Your EA can help you with new employees and staff, work with contractors and vendors in your network, and manage third-party services. They can be especially helpful with onboarding, orientations, and the early stages of recruitment.

- 65. Post job listings on career websites and filter resume submissions.
- 66. Liaise with job candidates to guide them through the application process.
- 67. Send thank-you notes, birthday greetings, or gifts to important clients.
- 68. Manage crew shifts and submit regular time sheet reports.





Advanced Tasks and Responsibilities

You might be surprised with what your EA can accomplish, especially with enough time to learn on their own, a little guidance from you, and the help of AI tools.

- 69. Cold calling and sales outreach.
- 70. Creating slide decks for company-wide presentations.
- 71. Competitive analysis and market research.
- 72. Edit and update web pages.
- 73. Prepare training or orientation materials.
- 74. Screen applications for affiliate programs.
- 75. Create a content calendar for your social media accounts and blog.
- 76. Organize events such as conferences, training, or team-building days.
- 77. Analyze website analytics such as traffic, page views, click-throughs, etc.
- 78. Answer employees' questions about company processes.
- 79. Answer support or help desk tickets.
- 80. Update online storefront or catalogs.
- 81. Monitor and report on brand mentions on the web and social media.



82. Manage spreadsheets with financial data.
83. Generate leads from social media or online databases.
84. Monitor online reviews, and contact site owners to remove invalid reviews.
85. Nurture leads with follow-up emails or messages.
86. Orient and train new virtual talent.
87. Provide customer service as the first point of contact.
88. Provide live chat or instant messaging support.
89. Create and implement forms or surveys for customer feedback.
90. Reconcile transactions and maintain financial records with bookkeeping software.
91. Send client invoices.
92. Set up new hires' or contractors' company accounts.
93. Review and screen guest posts for your blog.
94. Social media community management.
95. Analyze and report on social media analytics.
96. Track accounts payable and receivable using cloud accounting software.
97. Produce customer care scripts for common issues or requests.
98. Create and implement forms or surveys for customer feedback.
99. Create presentations or slide decks.
100. Write blog posts, newsletters, press releases, ebooks, etc.



Get a Virtual Executive Assistant

Tell us what you need and we'll find the right assistant for you. Our multi-step screening process guarantees you only work with the top 0.5% of assistants.

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