

25 Things You Can Delegate to a Client Services Assistant

Delegation is one of the most effective tools in a finance leader's tool kit because it helps you grow your firm. To get started, here's a list of commonly delegated tasks that you can hand over today!

Administrative Support:

- Email, text & voicemail management
- Calendar, time management, and scheduling
- Travel
- Expense reports
- Meeting agendas, notes & action-item follow-up
- Appointment prep, dictation & follow-up
- Thank you notes & gift buying

Document Preparation:

- Prepare presentations & documents for client meetings
- Provide documents & reports for client onboarding

Marketing:

- Newsletter distribution
- Keeping LinkedIn up-to-date
- Internal team coordination to keep projects & client deliverables moving
- Content updating & repurposing across platforms

Client Services:

- Responding to general questions or inquiries
- Liaison between client and other partner/vendors/contractors
- Respond to client requests
- Process account paperwork & account transfers

Operations:

- Project coordination
- CRM updates & management
- Event planning
- Create & update SOPs & best practices
- Light bookkeeping

Personal:

- Keep work & home calendars synced
- Scheduling appointments
- Planning family events

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