

104 TASKS

TO LIBERATE YOUR TIME
- SO YOU CAN FOCUS ON
THE FUN STUFF



MiPA

SUPPORTING YOU

- Answer your phone calls
- Respond to your DMs and progress them through your sales process
- Book in your clients for appointments
- Book in prospects for discovery calls
- Ask a series of questions to qualify your prospects
- Sort out an inbox that has been left for too long and is out of control
- Manage and reply to all emails in your inbox - so you only have the most important emails to respond to
- Manage your info inbox or your general team inbox
- Book weekly, monthly or yearly client appointments in advance
- Book in 1-2-1s with your team
- Send out team communications
- Carve out focus time in your diary
- Preparing presentations

WOW YOUR CUSTOMERS

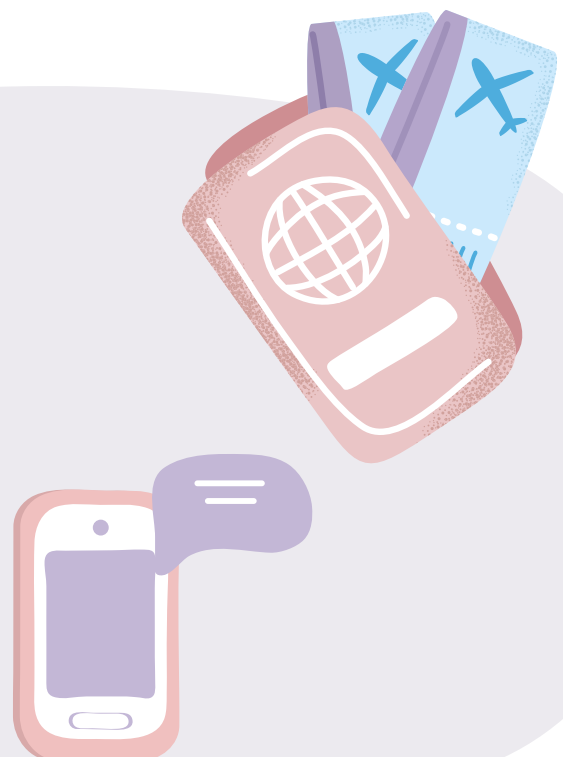
- Send out gifts to your clients
- Overhaul your onboarding process and build in WOW moments
- Reconnect with previous customers and clients
- Send out gifts or handwritten cards to contacts who pass you referrals
- Contact your customers to leave FB, Google and Trustpilot reviews
- Confirm your customers' appointments the day before and minimise cancellations
- Be your client experience/onboarding team
- Respond to customer enquiries
- Follow up with clients
- Call your customers for their experience to create meaningful case studies to show your impact
- Create and send thank you cards to customers

PERSONAL / FAMILY / LIFE ASSISTANT

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TRAVEL PLANNING / ARRANGEMENTS

- Book your hotels
- Let us research the best travel options for appointments and we'll book it and take care of it
- Parking pre-booked prior to appointments
- Research holiday options
- Train and flight bookings
- Arrange VISAs and all travel documentation
- Co-ordinate team travel



FINANCIAL ORGANISATION

- Make sure all of your invoices/receipts end up in the right place for your bookkeeper
- Make sure all of your clients are signed up for GoCardless or automatic payments
- Create and send all customer invoices
- Contact customers for overdue Payments/chase outstanding payments
- Manage/implement expense processes

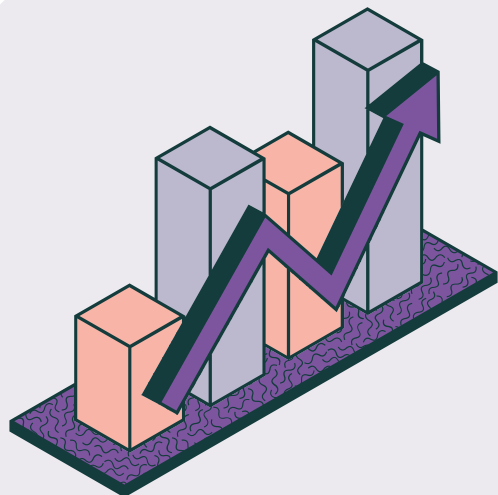


SOCIAL MEDIA / MARKETING

- Create your social media posts
- Schedule your social media posts
- Upload blogs and videos to your website
- Schedule and implement weekly emails
- Product website management
- Search for and contact industry experts or guests to participate in your podcast or webinar
- Create Email newsletters
- Upload videos on YouTube
- Respond to and moderate YouTube comments
- Create and manage LinkedIn Account/Profile
- Respond to all LinkedIn comments and messages
- Adding intros and outros to videos
- Organise online events
- Organise in-person events
- Set up & Manage Google My Business

SALES SUPPORT

- Follow up on leads, keep them warm and move them through your sales process
- Follow up on leads you never contacted or have left to go cold
- Reach out to podcasts that you would like to appear on
- Cleanse your data lists and ensure the decision-maker and all details are up to date
- Send messages to prospects on LinkedIn
- Arrange meetings with prospects
- Manage and respond to online chat
- Upsell existing customers to monthly service packages/additional products or packages
- Mystery shop your competitors
- Follow up on quotes – make sure they have been received and progress to sale
- Add to your CRM prospect lists/database
- Cleanse your database and make sure customer data is up to date
- Database building
- Send out the 3-line email (if you don't know what it is, ask us 😊)



HERE ARE JUST SOME OF THE TOOLS WE WORK WITH TO HELP YOU FOCUS ON THE FUN STUFF

pipedrive

monday.com



ZOHO

HubSpot

Active Campaign >

asana

Gmail

Trello

Office 365

ClickUp

JOBBER