



Professional. Excellent. Always.

Workflow Efficiency Checklist

25 TASKS YOU **SHOULDN'T** BE DOING YOURSELF



COMMUNICATION & INBOX MANAGEMENT

- Email sorting, filtering and filing
- Calendar scheduling
- Meeting reminders
- Email follow-ups
- Customer enquiry responses



DOCUMENT & FILE MANAGEMENT

- File organisation
- Data entry
- Document template
- e-Signature workflows
- Version control & history



FINANCE & BILLING

- Invoice generation
- Payment reminders
- Expense tracking
- Monthly reports
- Supplier payments



CLIENT & PROJECT MANAGEMENT

- New client onboarding
- Task delegation
- Project progress tracking
- Feedback collection
- Off boarding



MARKETING & ONLINE PRESENCE

- Newsletter delivery
- Social media post scheduling
- Blog-to-email automation
- Lead capture & tagging
- Review requests



NEXT STEPS

Even automating just five tasks from this checklist can save you 3-5 hours per week. If this checklist made you realise how much time you're losing to admin, reach out today:

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Book a free 30 minute discovery call with us - we'll audit your workflow efficiency, identify which tasks you can automate or delegate, and show you how to reclaim precious hours every week,

[CLICK HERE TO BOOK](#)