

# TASKS OUR VIRTUAL ASSISTANTS CAN TAKE ON

## BASIC STANDARD SKILLS

- Maintaining digital records, databases, and logs of virtual interactions with clients/contacts
- Manage personal/business calendar
- Edit, ghostwrite, and redline documents
- Support with daily tasks
- Book and coordinate travel
- Order gifts, supplies, and hardware
- Return items to online stores
- Create/correct simple documents in English and Spanish
- Note-taking and agenda setting for meetings

## ADVANCED STANDARD SKILLS

- Manage in-house automations
- Handle administration projects
- Support accountability department
- Create and edit budgets
- Assist with interpretation during meetings, interviews, presentations, and calls
- Manage relationships with partners, donors, congress, etc.
- Assist in board engagement activities
- Liaise with other businesses

## COURTPALS

### RECEPTION

- Responding to inquiries through email, chat, or other virtual communication methods on behalf of the company
- Organize scanned paperwork and electronic files
- Handle incoming calls from clients and reach out to collect documents
- Schedule/re-schedule appointments, meetings, calls, and calendar reminders for high-level staff and clients
- Overseeing virtual reception platforms and ensuring a seamless online experience
- Coordinating and overseeing mailing and deliveries or mailing notifications
- Offering information about the organization, products, or services through virtual channels
- Recording and relaying messages through email, messaging apps, or collaboration platforms
- Collect electronic signatures
- Follow up with clients for document procurement

### LEGAL

- Fill out applications with your clients
- Provide updates on cases
- Process and prepare partial filings
- Process and prepare complete filings
- Assisting the intake manager on cases referred out by the firm
- Confer with attorneys and provide them with a verbal and written summary of calls with clients
- Prepare forms, cover letters, and motion drafting
- Communications with government and institutions
- Assist during virtual hearings
- Prepare clients for hearings

## MARKETING

- Developing and creating digital content for online marketing campaigns, including graphics, videos, and written content
- Edit image, video, and audio files
- Help maintain a blog and update the website
- Manage email campaigns
- Manage PR
- Planning and executing social media campaigns, scheduling posts, and engaging with the online community
- Assisting in the creation and management of online advertising campaigns
- Conducting online research to gather information about industry trends, competitors, and target audiences
- Collaborating on search engine optimization (SEO) efforts, including keyword research and optimizing online content for search engines
- Prospecting clients

## FUNDRAISING

- Manage donor relationships, draft and send donor thank you letters and cards
- Research and build a list of potential donors
- Assist in drafting solicitation letters
- Support donor engagement activities
- Maintain donor/sponsor database
- Managing digital donation platforms, processing online donations, and ensuring accurate donor records
- Conducting online research for potential grant opportunities and contributing to the writing of grant proposals
- Assisting in the preparation and coordination of virtual meetings, presentations, and pitches for potential donors

## HUMAN RESOURCES

- Manage payroll
- Facilitate the remote onboarding process for new employees
- Assist with online job postings and scheduling virtual interviews
- Manage digital recruitment platforms
- Maintain digital employee records
- Manage employee benefits programs
- Support digital performance review processes
- Address employee inquiries and concerns related to HR policies, benefits, and other HR-related matters
- Ensure staff accountability

## EVENT ORGANIZATION

- Assisting in the planning and execution of virtual events, webinars, and online promotional activities
- Assisting in the planning and execution of in-person events, workshops, and in-person promotional activities (The VA's involvement is limited to activities that can be coordinated remotely for in-person events)
- Document and track action items
- Manage invitations and reservations
- Keep records & issue receipts
- Manage event technology
- Make post-event acknowledgments
- Coordinate courier pick-up/drop-offs

## INFORMATION TECHNOLOGY

- Provide remote assistance to employees for troubleshooting hardware, software, and network issues
- Manage virtual help desk systems
- Address and resolve IT-related tickets
- Administer and maintain virtual servers, networks, and cloud-based systems
- Assist in the deployment and maintenance of software applications
- Monitor and ensure the security of virtual systems
- Diagnosing and resolving issues related to remote network connectivity, VPNs, and other connectivity challenges
- Create and maintain digital documentation and knowledge base resources for common IT issues and solutions
- Develop code for websites and apps

## FINANCIALS AND COMPLIANCE

- Prepare forms, including tax forms and corporate documents
- Coordinate services with bookkeeper or accountant
- Perform bookkeeping
- Overseeing and reconciling virtual expense reports
- Generating and processing virtual invoices
- Managing virtual payroll processes
- Assist with an annual audit and other types of audits
- Develop process documents
- Write internal policy memos

## COURTPALS

### SALES

- Lead research and CRM management
- Coordinating and scheduling virtual sales meetings, demos, and calls for the sales team
- Assisting in the creation and formatting of virtual proposals, quotes, and presentations
- Generating and analyzing virtual sales reports to track performance and identify areas for improvement
- Assisting in the planning and execution of virtual sales events, webinars, or online product launches
- Providing virtual support to customers with inquiries, order tracking, and basic product or service information