

Delegation 101

Digital Marketing



LANDING PAGES



ClickFunnels



Kajabi



Lead Pages



Kartra

- Integration with CRM & payment provider
- Top 5 funnels (most popular is Lead Magnet to Consult funnel)
- Test and troubleshoot funnels
- Other popular landing pages



LEAD MAGNET

- Design with templates
- Compress to small PDF
- Create display images
- Upload to website
- Automate delivery

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SOCIAL MEDIA

- Research competitors
- Collate social media quotes
- Source royalty free images
- Design quote images
- Research social media hashtags
- Schedule social media posts
- Design cover/banner images for social media profiles
- Design Instagram stories



EMAIL MARKETING



Keap / Infusionsoft



ActiveCampaign



Mailchimp



AWeber



ConvertKit



Kartra



Kajabi

- Creating segments, audiences and lists
- Setting up automated email nurtures
- Sending email broadcasts
- Tracking email metrics daily

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WEBSITE



Wordpress



Squarespace

- Upload a professionally-designed theme to your website
- Tailor the theme to your branding imagery and copy
- Manage and make website updates
- Build brand new pages
- Set-up Google Analytics



BLOGGING



Wordpress

- Create a blog
- Design banners and graphics
- Format blog posts
- Moderate comments
- Set up hosting
- Add integration to your email autoresponder
- Integrate booking calendars

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FACEBOOK GROUPS

- Create your Facebook group
- Design and upload group banner
- Approve requests to join
- Schedule content in group
- Maintain comments and engage with members
- Download testimonial videos



FACEBOOK

- Create Facebook Page
- Set-up Facebook Business Manager
- Design Facebook cover image
- Collate daily Facebook Ads tracking spreadsheet
- Moderate Facebook Ad comments

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WEBINAR



Demio



EverWebinar

- Design and prepare webinar slide pack
- Edit webinar videos
- Upload to video hosting platforms (Vimeo, Wistia or Youtube)

- Set-up Webinar Platform
- Moderate and provide support during webinar



EBOOK

- Design formatting of eBook
- Set-up flipbook

- Design book cover
- Host book online

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Digital Marketing

ONLINE PORTAL



Wordpress



Kajabi



Teachable



ClickFunnels

Build portal

Upload videos and worksheets

Add logos and brand colours

Create quizzes (if available)

Manage and update portals

Automate registrations and access

Create courses, modules and lessons

Troubleshoot portal access problems

WEBSITES



Wordpress



Squarespace

Set-up hosting and Wordpress

Add integration on Website to your email auto-responder

Create emails

Integrate booking calendars

Set-up emails in Gmail or Helpscout

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Tech



BLOGGING

- Build Wordpress blog
- Design theme for Wordpress blog
- Format blog posts
- SEO on blog posts
- Moderate blog comments



APPOINTMENT SETTING



ScheduleOnce



Calendly



Acuity

- Set-up booking calendar
- Integrate with your Google/ Outlook etc. calendar
- Embed calendar on landing page
- Manage cancellations or rescheduling



VIDEO EDITING

- Import, edit and save videos
- Upload to video hosting platforms
- Embed in online portal
- Embed on landing pages

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Tech



SURVEYS & FORMS

- Create a Typeform form
- Set-up automations and workflows within the form
- Embed form on landing page
- Report results from Typeform
- Collate weekly Q&As submitted on a Typeform
- Collate feedback from a Typeform survey
- Distribute answers for weekly Q&As



PAYMENT PROCESSOR

PayPal stripe

- Create products
- Create subscriptions
- Connect with auto-responder
- Connect with landing page builder
- Charge a customer

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Graphic Design



Lead Magnet

- Design with templates
- Compress to small PDF
- Create display image
- Create product/ service mockups

Online Portal

- Add logo and brand colours to your online portal
- Design course and module tiles
- Design worksheets
- Design buttons

Ebook

- Design book cover
- Design & layout internal pages of the book

Social Media

- Source royalty-free social media images for posts
- Design social media quotes
- Design quote images
- Design Instagram stories
- Design Pinterest tiles
- Design Facebook Page banners
- Design Facebook Group banners
- Design Youtube thumbnails
- Design Instagram highlight covers
- Design reel covers
- Design profile photos
- Create videos such as IGTVs and Reels
- Create animated intro logo
- Create social media graphic templates

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Graphic Design

Branding:

- Create logo
- Create brand guide

Other

- Design slide decks and presentations
- Banners for your blog, website, portal
- Flyers

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Business Admin



Email Inbox

- Find FAQs and set-up saved replies
- Clean up your inbox
- Filter your emails for quick handling
- Unsubscribe from unwanted lists
- Reply to up to 90% of your emails



Survey's & Forms

- Ongoing typeform or google management
- Collate weekly Q&A form completions



Manage Your CRM

- Create or import new contacts
- Set-up new products or subscriptions
- Merge duplicate contacts



Facebook Groups

- Schedule content
- Approve requests to join
- Moderate group comments

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Business Admin



Live Calls

- Set-up live calls in Zoom
- Add live calls to your calendar with links
- Add live calls to the portal calendar
- Download and transcribe / time stamp live calls
- Upload recordings to the portal



Portal Management

- Unlock courses for an individual or group of members
- Add new videos and worksheets
- Troubleshoot portal access problems



Testimonials

- Collate testimonials from Facebook Page, Facebook Groups, email inbox
- Download video testimonials
- Save and file testimonials
- Upload testimonials to website and



Accounts Receivable

- Set-up email nurtures
- Find and message clients on Facebook
- Delete duplicate invoices in payment tool
- Manually recharge cards that fail

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Business Admin

Train Your Next VA

- Get your next VA up-to-speed with the business, market, products and processes
- Manage onboarding
- Set-up your logins
- Give access to necessary branding and documents
- Divide your tasks / projects between VAs
- Quality check initial work
- Mentor your next VA