

AVIDUS

FREE CHECKLIST

128+ Tasks You Can Outsource to Avidus

Every call, DM, booking and admin job quietly eating your week — and exactly what a trained Avidus team can take off your plate.

Repair & maintenance · Med-spa · Growing service businesses

avidus.tech · Insight · Impact · Assist

Tick what you would love off your plate — then bring the list to a call.

How to use this checklist

Below are 128 tasks businesses like yours hand to a trained team every day. Read down each list and tick every task you would rather not be doing yourself. Most owners are surprised how fast the boxes add up — that stack of ticks is roughly the week you could get back. When you are done, book a strategy call and we will map the ones worth handing off first.

1. Phone & reception

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| ☐ Answer inbound calls live during business hours | ☐ Provide after-hours & overflow call coverage |
| ☐ Screen and route calls to the right person | ☐ Take detailed messages and text you summaries |
| ☐ Handle voicemail follow-up and callbacks | ☐ Answer FAQs on services, pricing, and hours |
| ☐ Warm-transfer urgent calls to on-call staff | ☐ Log every call in your CRM |

2. Scheduling & booking

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|---|--|
| ☐ Book new appointments into your system | ☐ Reschedule and cancel appointments |
| ☐ Send appointment confirmations | ☐ Send reminder texts and emails |
| ☐ Manage your calendar and avoid double-bookings | ☐ Coordinate multi-step or recurring jobs |
| ☐ Maintain a waitlist and fill open slots | ☐ Confirm next-day schedules |

3. No-show & cancellation recovery

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| ☐ Confirm appointments 24–48 hours ahead | ☐ Run reminder sequences to cut no-shows |
| ☐ Backfill cancellations from your waitlist | ☐ Follow up on missed appointments to rebook |
| ☐ Track no-show patterns and flag repeat offenders | ☐ Enforce your cancellation policy, politely |

4. Lead follow-up & sales support

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| ☐ Respond to web-form leads within minutes | ☐ Reply to Instagram, Facebook & Google DMs |
| ☐ Qualify inbound leads against your criteria | ☐ Follow up on quotes that haven't closed |
| ☐ Nurture cold leads back to booking | ☐ Chase abandoned bookings and carts |
| ☐ Schedule sales and consult calls for you | ☐ Keep your pipeline updated in the CRM |

5. Customer service & support

- ☐ Answer customer questions by email and chat
- ☐ Process refunds and resolve complaints to policy
- ☐ Send post-service follow-ups and thank-yous
- ☐ Escalate issues that truly need your attention
- ☐ Handle order and appointment status requests
- ☐ Request, collect and respond to reviews
- ☐ Run loyalty and referral outreach

6. Email & inbox management

- ☐ Monitor and triage your inbox daily
- ☐ Flag and prioritize what needs you
- ☐ Organize folders, labels, and filters
- ☐ Draft and send routine replies
- ☐ Unsubscribe and clear the clutter
- ☐ Manage shared and team inboxes

7. Calendar & executive support

- ☐ Manage your personal and work calendar
- ☐ Prepare meeting agendas and take notes
- ☐ Handle personal errands and reminders
- ☐ Manage subscriptions and renewals
- ☐ Book travel, flights, and accommodation
- ☐ Coordinate meetings across time zones
- ☐ Research information for your decisions

8. Data entry & admin

- ☐ Enter and update records in your systems
- ☐ Create and format documents and templates
- ☐ Maintain spreadsheets and trackers
- ☐ Transcribe voice notes and recordings
- ☐ Migrate and clean up messy data
- ☐ Convert files (PDF, spreadsheets, forms)
- ☐ Organize cloud files and folders
- ☐ Generate routine reports

9. Bookkeeping & finance

- ☐ Send and follow up on invoices
- ☐ Reconcile transactions
- ☐ Prepare payroll inputs
- ☐ Manage accounts payable and receivable
- ☐ Chase overdue payments
- ☐ Categorize expenses and receipts
- ☐ Prepare basic financial reports
- ☐ Liaise with your accountant

10. Quoting, invoicing & payments

- ☐ Prepare and send quotes and estimates
- ☐ Send invoices on completion
- ☐ Set up and manage payment plans
- ☐ Convert accepted quotes into jobs
- ☐ Take and process payments
- ☐ Track deposits and balances

11. Marketing & social media

- ☐ Schedule and publish social posts
- ☐ Write captions and basic copy
- ☐ Manage your content calendar
- ☐ Update your Google Business Profile
- ☐ Report on basic marketing metrics
- ☐ Respond to comments and DMs
- ☐ Design simple graphics from templates
- ☐ Send email newsletters
- ☐ Monitor mentions and engagement

12. Content & creative

- ☐ Draft blog posts and articles
- ☐ Edit short-form video and reels
- ☐ Source and license stock images
- ☐ Repurpose content across channels
- ☐ Format and upload content to your site
- ☐ Proofread and edit copy

13. Research & lead generation

- ☐ Build targeted prospect lists
- ☐ Find and verify contact details
- ☐ Enrich and update CRM records
- ☐ Research competitors and pricing
- ☐ Compile market and industry research
- ☐ Spot partnership and referral opportunities

14. Dispatch & field coordination (repair & maintenance)

- ☐ Dispatch jobs to the right technician
- ☐ Keep techs updated on their next stop
- ☐ Follow up on warranty and service calls
- ☐ Collect job photos and completion notes
- ☐ Optimize daily routes and schedules
- ☐ Coordinate parts and supplier orders
- ☐ Update jobs in Jobber, Housecall Pro or ServiceTitan
- ☐ Manage permits and compliance paperwork

15. Med-spa front office (aesthetics)

- ☐ Answer calls while providers are in treatment
- ☐ Recover no-shows on high-value appointments
- ☐ Manage membership and package renewals
- ☐ Handle intake forms and consent paperwork
- ☐ Follow up on treatment plans and rebooking
- ☐ Book consults and treatments in your platform
- ☐ Respond to after-hours DMs and inquiries
- ☐ Send pre- and post-treatment instructions
- ☐ Coordinate provider calendars across rooms

16. E-commerce & online

- ☐ Process and track orders
- ☐ Handle shipping and returns
- ☐ Update pricing and promotions
- ☐ Manage product listings and inventory
- ☐ Respond to marketplace messages

17. Recruitment & HR support

- ☐ Post job ads and screen applicants
- ☐ Prepare onboarding documents
- ☐ Coordinate rosters and timesheets
- ☐ Schedule interviews
- ☐ Maintain employee records

18. Operations & process

- ☐ Document your standard operating procedures
- ☐ Track KPIs and build simple dashboards
- ☐ Manage projects in Asana, Trello or ClickUp
- ☐ Prepare leadership and board updates
- ☐ Build checklists and workflow templates
- ☐ Audit processes for gaps and bottlenecks
- ☐ Coordinate vendors and suppliers
- ☐ Maintain your knowledge base or wiki

Ready to hand these off?

You just ticked the week you could get back. Book a 30-minute strategy call and we will show you exactly what an Avidus team would take off your plate — done for you, or as a dedicated team you build with us.

Book your strategy call: calendly.com/kathlynn-avidus/30min