

10 Tasks to Hand Off First

A quick-start checklist for small business owners ready to delegate

If you are still doing all of this yourself, you are spending owner-level time on tasks that do not need an owner. This checklist names the ten tasks that are easiest to hand off first, and how to do it without babysitting the handoff.

Why these ten first

Not every task is equally safe to delegate. The ten below share three things: they are well-documented (or easy to document), they are low-risk if a step is missed once, and they free up hours every single week rather than once a quarter. Start here before touching anything higher-stakes.

The checklist

- 1. Inbox triage.** Sorting, flagging, and drafting replies to routine emails so your inbox stops being your to-do list.
- 2. Calendar management.** Booking, confirming, and rescheduling meetings — including chasing the replies that never come.
- 3. Data entry.** Getting information out of forms, spreadsheets, and PDFs and into the systems you actually run your business on.
- 4. First-line customer support.** Answering the questions you get asked every week, so only the genuinely new ones reach you.
- 5. Appointment scheduling.** Coordinating calendars across clients, vendors, and your own team.
- 6. Basic bookkeeping tasks.** Invoicing, expense logging, and reconciling receipts — the recurring admin around your books, not the judgment calls.
- 7. Travel and logistics.** Booking flights, hotels, and itineraries, and rebooking them when plans change.
- 8. Research tasks.** Vendor comparisons, competitor scans, and fact-finding that eats an afternoon if you do it yourself.
- 9. Social media scheduling.** Queuing up posts on a calendar you set, so consistency does not depend on you remembering.

10. Document and report prep. Turning raw notes and numbers into a clean deck, doc, or report someone else can act on.

How to hand it off without hand-holding

Delegating badly is worse than not delegating — it just moves the work onto explaining it. Four steps make the handoff stick:

- **Document the process once.** A short list of steps, screenshots included, beats a verbal explanation you will have to repeat.
- **Start with one task, not ten.** Prove the handoff works before you stack on the rest.
- **Set a short trial period.** Two weeks with regular check-ins tells you more than a single week of silence.
- **Review outcomes, not activity.** Judge the handoff by whether the task got done right — not by how closely you watched it happen.

The pattern behind all ten: none of them require your judgment every time — they require it once, when you set up the process. After that, they are exactly the kind of work a trained, managed VA should be running.

Ready to hand these off to someone who already knows how?

OverseasVA staffs and manages virtual assistants who are trained on exactly this kind of work — not just matched to a job post. If you would rather talk it through than start from a blank checklist, book a free call and we will help you figure out what to hand off first.

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