



The Checklist Your VA Should Be Running For Your Business

This is what great admin support looks like behind the scenes — 30 tasks handled daily, weekly, monthly and quarterly to keep a trades or small business running smoothly.

If you're currently doing all of this yourself, it might be time to talk.

■ DAILY TASKS

EVERY DAY

☐ Check and respond to all emails and messages on your behalf	<i>Inbox managed, nothing missed</i>
☐ Confirm upcoming jobs and appointments for the next day	<i>No last-minute surprises for you or your clients</i>
☐ Log expenses and receipts as they come in	<i>Tax time sorted before it arrives</i>
☐ Update job tracking with progress notes	<i>Everything documented so invoicing is fast and accurate</i>
☐ Send quotes from today's site visits	<i>Same-day quotes win more jobs</i>

■ WEEKLY TASKS

EVERY WEEK

☐ Invoice all completed jobs	<i>Cash flow depends on sending invoices promptly</i>
☐ Chase outstanding or overdue invoices	<i>Polite, professional follow-ups handled for you</i>
☐ Review the schedule for the next two weeks	<i>Conflicts and gaps spotted early</i>
☐ Follow up on quotes that haven't been accepted	<i>Don't leave money on the table</i>
☐ Order or restock materials for upcoming jobs	<i>No costly mid-project delays</i>
☐ Check in with subcontractors on active projects	<i>Communication tight, timelines on track</i>
☐ File or scan all paper receipts and documents	<i>Nothing lost, everything organised</i>

■ MONTHLY TASKS

EVERY MONTH

☐ Reconcile accounts and review income vs expenses	<i>You know your numbers without waiting for your accountant</i>
☐ Review aged receivables — who owes you money	<i>Anything over 30 days gets actioned</i>
☐ Check the pipeline — is there enough work booked ahead?	<i>Thin pipeline spotted early, leads followed up in time</i>
☐ Check expiring licences, insurances and registrations	<i>Calendar reminders set 60 days ahead — never caught out</i>
☐ Send a check-in to past clients you haven't heard from	<i>Repeat business and referrals from a simple email</i>
☐ Review subscriptions and software costs	<i>No money wasted on tools you're not using</i>
☐ Back up important files and documents	<i>Cloud backups kept up to date</i>
☐ Set priorities for next month	<i>3 clear goals, ready to go</i>



■ QUARTERLY TASKS

EVERY 3 MONTHS

☐	BAS preparation and lodgement support (if GST registered)	<i>Due Oct, Feb, Apr, Jul — never missed</i>
☐	Review pricing — are your rates still profitable?	<i>Regular check keeps margins healthy</i>
☐	Audit supplier relationships and costs	<i>Better deals found, savings passed on</i>
☐	Check equipment and vehicle service schedules	<i>Nothing breaks down at the worst time businesses</i>
☐	Review WHS compliance — safety docs, inductions, incident logs	<i>Non-negotiable for builders and construction businesses</i>
☐	Request Google reviews from happy clients	<i>More reviews = better local search rankings</i>
☐	Review business goals — are you on track?	<i>Quarterly check-in keeps the big picture in focus</i>

Seeing tasks that are currently falling through the cracks?

That's exactly what I'm here for. Book a free 30-minute discovery call at www.thepersonalva.com and let's talk about what it would look like to hand this over.