



HOW TO CREATE A TO DO LIST

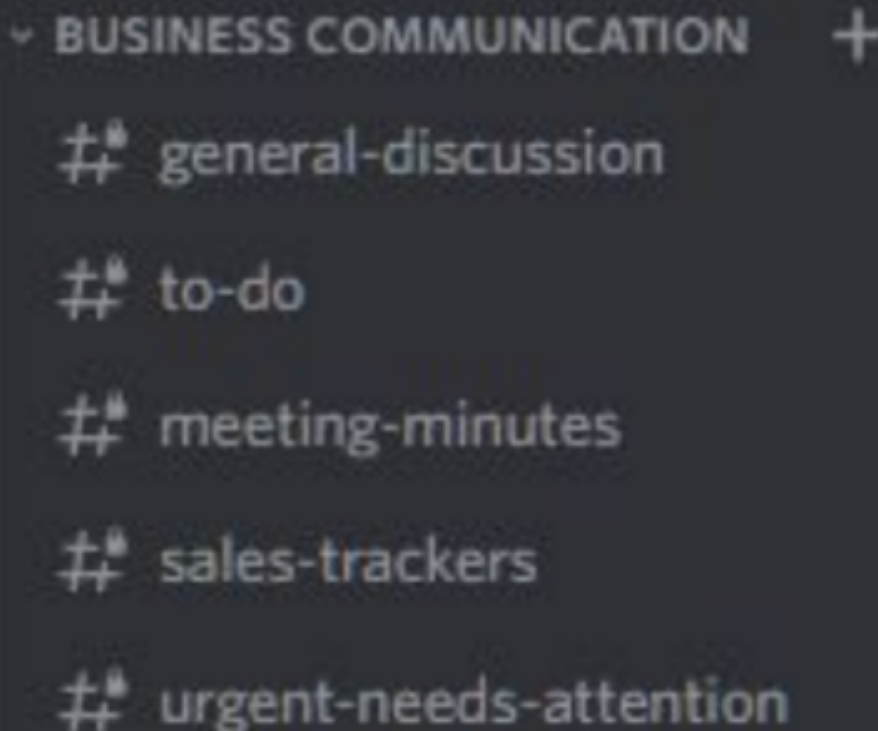


HOW TO HAVE YOUR ASSISTANT MANAGE YOUR DAILY TO-DO LIST

OBJECTIVE: To effectively help your client manage all the things on their plate and make sure nothing falls off the plate.

SCOPE: This SOP applies to the creation and management of a To-Do List system for your Client.

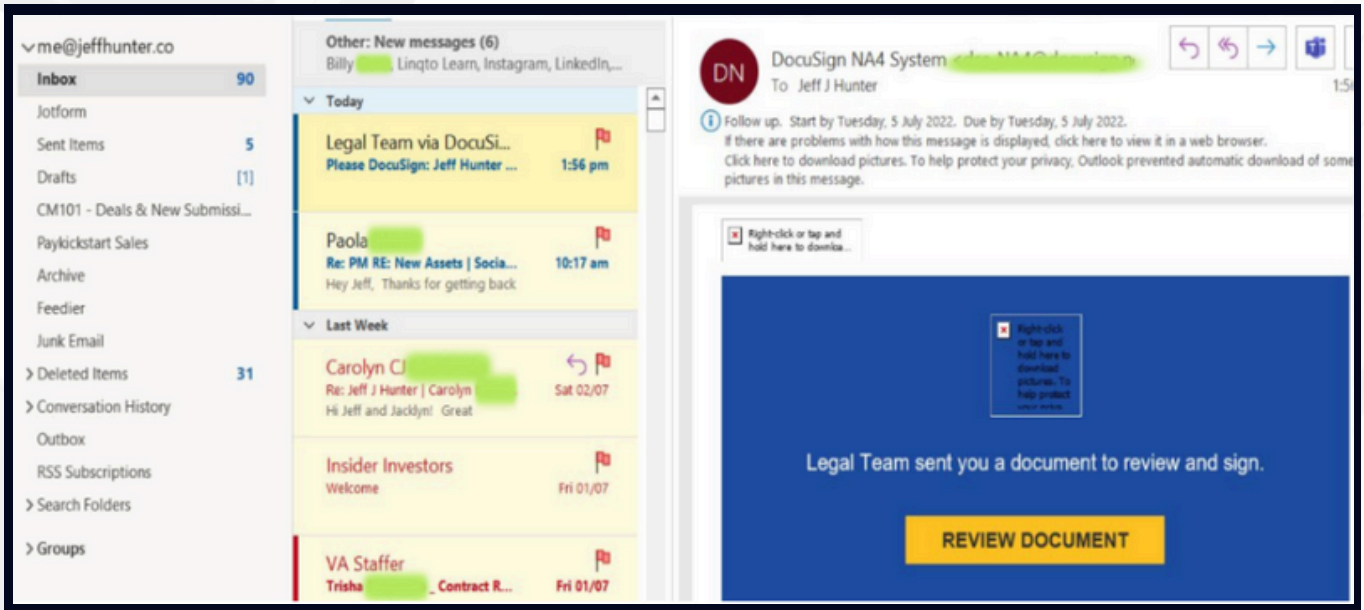
- STEPS:**
1. Make sure you have access to your client's email and calendar
 2. Make sure a clear communication channel is made to help make sure updates and communications are easily navigable.



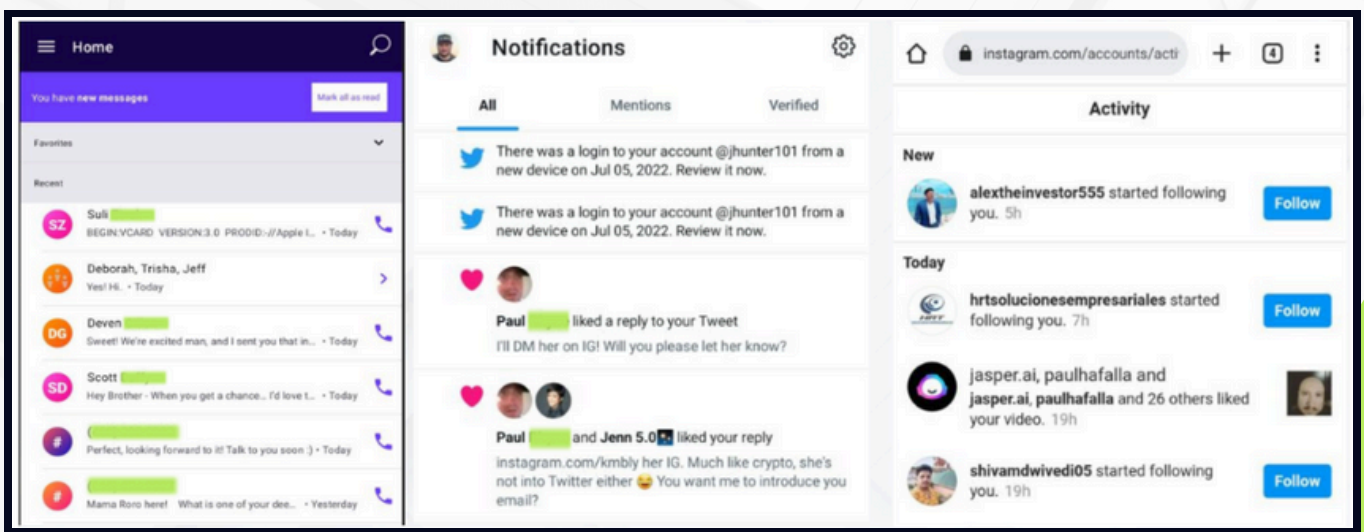
Business communication items:

- general-discussion
- to-do
- meeting-minutes
- sales-trackers
- urgent-needs-attention

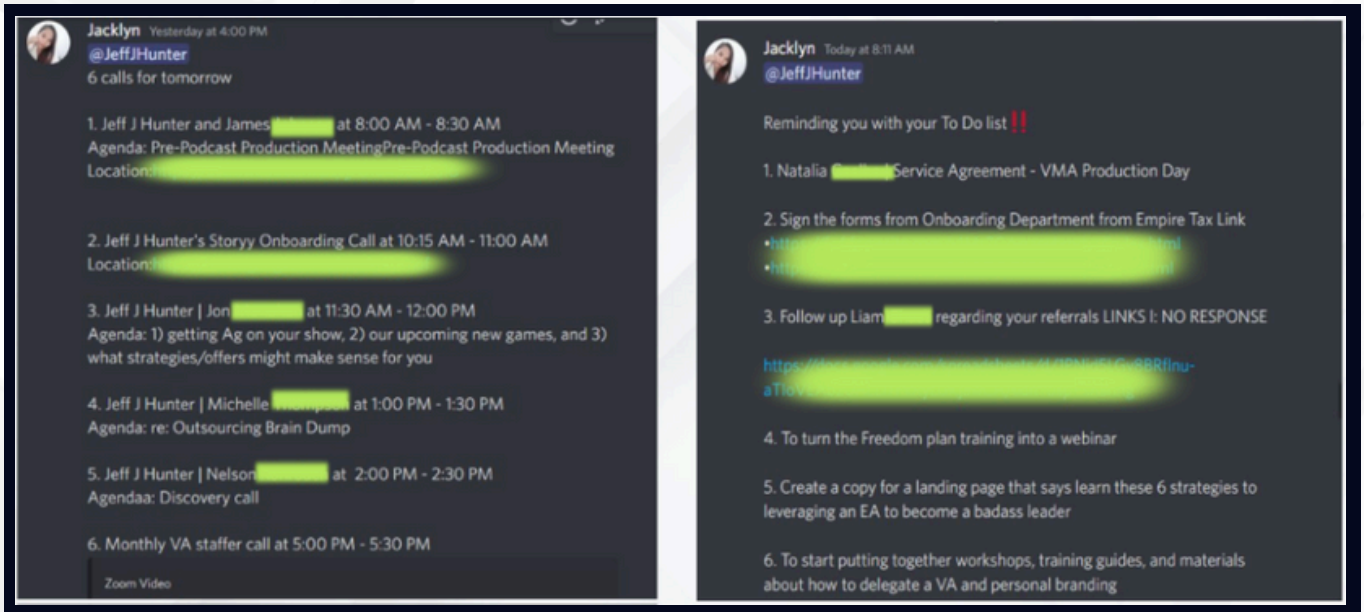
- Before your client starts their work for the day, check their email and calendar then compile into 2 different categories: Items you can handle yourself and items that require your client.



- Also check your client's social media and others for any messages that requires attention. This includes FB Page inbox, Instagram DM, LinkedIn Messages, etc.



5. Send a summary of all items that require your client on the designated communication channel



Jacklyn Yesterday at 4:00 PM
@JeffJHunter
6 calls for tomorrow

1. Jeff J Hunter and James [redacted] at 8:00 AM - 8:30 AM
Agenda: Pre-Podcast Production Meeting
Location: [redacted]
2. Jeff J Hunter's Story Onboarding Call at 10:15 AM - 11:00 AM
Location: [redacted]
3. Jeff J Hunter | Jon [redacted] at 11:30 AM - 12:00 PM
Agenda: 1) getting Ag on your show, 2) our upcoming new games, and 3) what strategies/offers might make sense for you
4. Jeff J Hunter | Michelle [redacted] at 1:00 PM - 1:30 PM
Agenda: re: Outsourcing Brain Dump
5. Jeff J Hunter | Nelson [redacted] at 2:00 PM - 2:30 PM
Agenda: Discovery call
6. Monthly VA staffer call at 5:00 PM - 5:30 PM

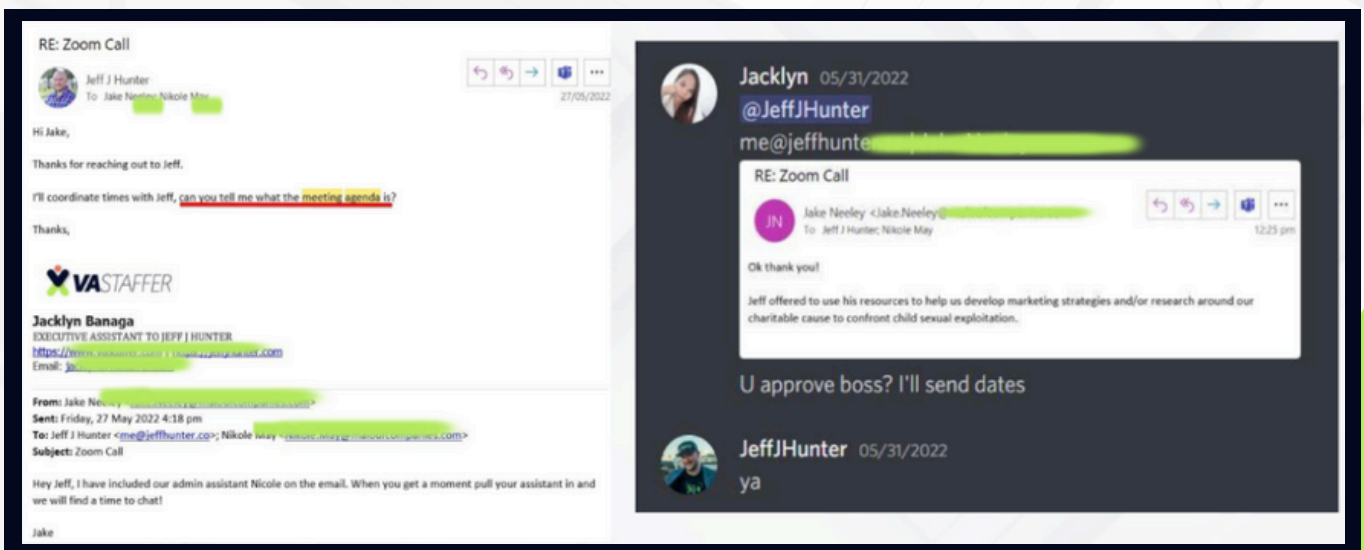
Zoom Video

Jacklyn Today at 8:11 AM
@JeffJHunter

Reminding you with your To Do list !!

1. Natalia [redacted] Service Agreement - VMA Production Day
2. Sign the forms from Onboarding Department from Empire Tax Link
• [https://www.empiretax.com/...](#)
3. Follow up Liam [redacted] regarding your referrals LINKS I: NO RESPONSE
<https://www.empiretax.com/...>
4. To turn the Freedom plan training into a webinar
5. Create a copy for a landing page that says learn these 6 strategies to leveraging an EA to become a badass leader
6. To start putting together workshops, training guides, and materials about how to delegate a VA and personal branding

6. Throughout the day, check your client's email and calendar for additional updates.



RE: Zoom Call

Jeff J Hunter
To: Jake Neeley, Nikole May

Hi Jake,

Thanks for reaching out to Jeff.

I'll coordinate times with Jeff, can you tell me what the meeting agenda is?

Thanks,

VASTAFFER

Jacklyn Banaga
EXECUTIVE ASSISTANT TO JEFF | HUNTER
<https://www.vastaffer.com/>
Email: jb@jeffhunter.com

From: Jake Neeley <jake@jakeandnikole.com>
Sent: Friday, 27 May 2022 4:18 pm
To: Jeff J Hunter <me@jeffhunter.co>; Nikole May <nikole@jakeandnikole.com>
Subject: Zoom Call

Hey Jeff, I have included our admin assistant Nicole on the email. When you get a moment pull your assistant in and we will find a time to chat!

Jake

Jacklyn 05/31/2022
@JeffJHunter
me@jeffhunte[redacted]

RE: Zoom Call

Jake Neeley <jake@jakeandnikole.com>
To: Jeff J Hunter, Nikole May

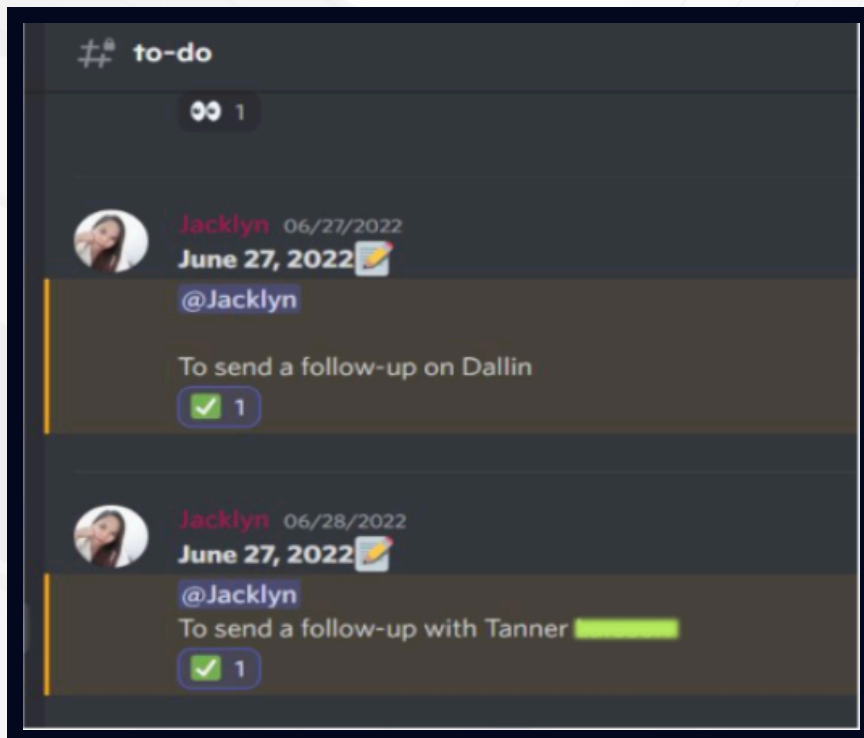
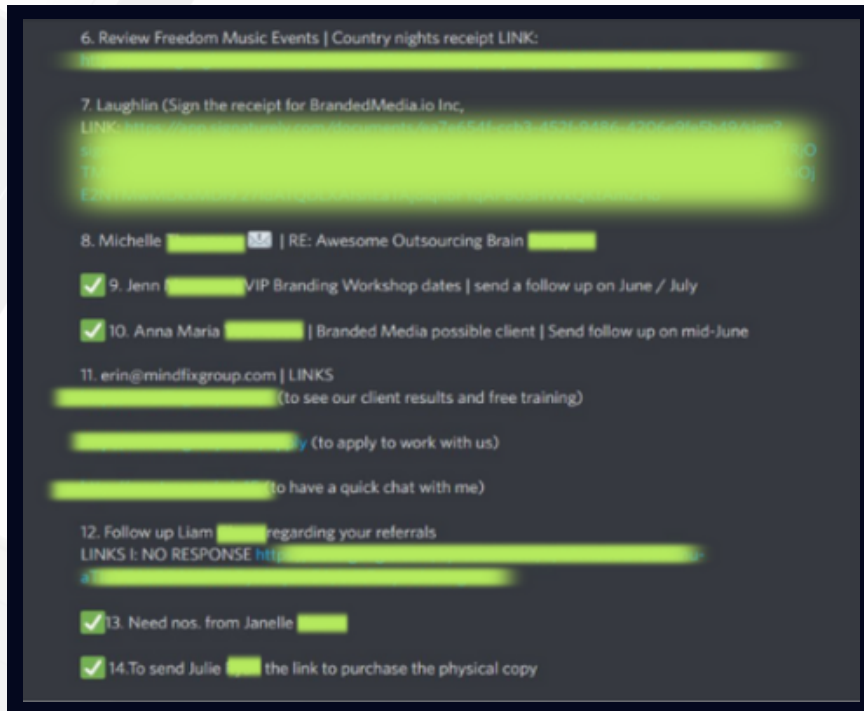
Ok thank you!

Jeff offered to use his resources to help us develop marketing strategies and/or research around our charitable cause to confront child sexual exploitation.

U approve boss? I'll send dates

JeffJHunter 05/31/2022
ya

7. Before the end of the day, finalize the to-do list for which ones are completed and which ones are forwarded for the next day.



 **SCAN
CALENDAR**

BOOK A STRATEGY CALL

Jeff J Hunter

*Founder VA Staffer
Pre-Trained, Pre-Vetted Executive
Assistants*

