

21 JOBS YOU DON'T HAVE TO DO

We all know there are some tasks that we are just not good at or we put off because they don't inspire us. In fact, spending time doing some of **these jobs could be inadvertently sabotaging your business** rather than helping it thrive.

The opportunities for outsourcing are endless; anything that is not client facing can be outsourced.

Here are **21 time and energy consuming tasks** where you won't see a great return on investment...EVER.



DISCOVERY MEETING

1. Prepare documentation
2. Tailor presentations
3. Set client up
4. Transcribe voice recorded file notes
5. Set and allocate tasks

RESEARCH & ADVICE PREPARATION

1. Update fact find into CRM
2. Obtain information from third parties (external super funds, banks and/or Centrelink)
3. Wealth solver (or equivalent)
4. Risk Researcher (or equivalent)
5. Prepare insurance quotes

ADVICE RECOMMENDATIONS

1. Format SOA
2. Prepare draft application forms
3. Implementation of recommendations
4. Revenue tracking

ONGOING ADVICE

1. Create reverse fact find (Client profile)
2. Prepare portfolio reports
3. Uploading and generating IFSA requirements
4. Prepare service agreements and FDS

PROACTIVE ACTIVITIES

1. Anniversary and retention follow-up
2. Budgeting programs for clients (set-up, bank reconciliations and reporting)
3. Xero for business-tracking (accounts payable, bank reconciliation and reporting)

