



Beyond Task Management:

Elevate Your Business with an Assistant

Learn how to take your support from task doer to project manager.





About Us

At AssistPro®, we pair business leaders with high-level Executive Support Partners (ESPs) who proactively manage not just tasks, but you as a leader. Our ESPs are more than assistants—they're strategic partners dedicated to boosting your productivity and helping drive your business growth.

01 Focus on Outcomes



02 Identify Key Projects You're Juggling



03 Break Projects into Manageable Phases



04 Choose Tools to Keep Projects on Track



05 Define Your Delegation Process




06 Create a Simple Project Workflow



07 Action Plan





A well-supported
leader isn't just more
productive—**they're
more focused,
creative,** and free to
drive their business
forward.

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Step 1: Focus on Outcomes

Instructions:

Identify the top 3 high-impact activities in your business.

Questions to consider:

- What are the objectives that drive significant outcomes and growth (use the 80/20 rule).
- What outcomes would you like an assistant to help you achieve?

1. _____
 2. _____
 3. _____
-

Step 2: Identify Key Projects You're Juggling

Instructions:

As a busy leader, you likely wear many hats and handle several projects at once. List 3 key projects or initiatives that are crucial to your business growth.

- Example: Building a website, launching a marketing campaign, managing client onboarding, developing new products.

Questions to consider:

- What are the things that constantly pull you away from focusing on strategy or higher-level tasks?

Your Project List:

1. _____
2. _____
3. _____

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Step 3: Break Projects into Manageable Phases

Instructions:

Break down each project into phases or key milestones. This makes it easier for your assistant to manage without needing your input on every little detail.

Questions to Consider:

- What are the critical steps or phases in each project?
- What tasks can be delegated to your assistant to free up your time?
- What does success look like at each phase?

Project Example: Building a Website

- Phase 1: *Research and planning (select platforms, create sitemap)*
- Phase 2: *Content creation (write copy, gather images)*
- Phase 3: *Design and development*
- Phase 4: *Launch and ongoing maintenance*

Your Phases for Key Projects:

- **Project 1:** _____
 - Phase 1: _____
 - Phase 2: _____
 - Phase 3: _____
 - Phase 4: _____
- **Project 2:** _____
 - Phase 1: _____
 - Phase 2: _____
 - Phase 3: _____
 - Phase 4: _____
- **Project 3:** _____
 - Phase 1: _____
 - Phase 2: _____
 - Phase 3: _____
 - Phase 4: _____

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Step 4: Choose Tools to Keep Projects on Track

Instructions:

Identify the tools your assistant will use to manage and keep these projects on track, ensuring they have what they need to stay organized and efficient.

- Questions to Consider:
 - What tools will help organize and track your projects? (e.g., Asana, Trello)
 - How can you streamline communication? (e.g., Slack, email, Zoom)
 - How will files be shared and updated? (e.g., Google Drive, Dropbox)

Your Tools for Project Management:

- Project 1: Tool(s): _____
 - Project 2: Tool(s): _____
 - Project 3: Tool(s): _____
-

Step 5: Define Your Delegation Process

Instructions:

Clear communication with your assistant is essential. Set up a simple yet effective system for how you will delegate projects and keep each other updated.

Questions to Consider:

- How will you assign projects to your assistant? (email, slack, project management tools)
- How often will you check in on progress? (daily, weekly updates)
- How will your assistant keep you updated on each project's status?

Your Delegation and Communication Plan:

- Project Assignment Method: _____
- Frequency of Check-ins: _____
- Preferred Reporting Method (e.g., daily summary, weekly meeting):

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Step 6: Create a Simple Project Workflow

Instructions:

Document a workflow for one of your key projects. This allows your assistant to take ownership and complete tasks without waiting for your approval at every step. Write down 3-5 key steps for one project that will help guide your assistant.

Example: Client Onboarding Process

1. *Send a welcome email with onboarding materials.*
2. *Schedule initial consultation.*
3. *Set up new clients in CRM and project management tool.*
4. *Follow up for feedback after the first meeting.*

Your Workflow:

- **Project:** _____
 - 1. _____
 - 2. _____
 - 3. _____
 - 4. _____
 - 5. _____
-

Step 7: Action Plan

Instructions:

Now that you have a process outlined for managing new projects, your assistant will be able to use this framework to manage projects independently in the future. By setting this foundation now, you're paving the way for a more efficient delegation and project management process down the line.

Questions to Consider:

- Do I have the necessary support in place to take on my next project, or should I reach out to AssistPro® to discuss bringing on an assistant who can help me effectively manage it?

Your Action Plan: _____

- **My Next Step:** _____



KEY TAKEAWAY:

Understanding the critical role an Executive Support Partner (ESP) plays in managing projects, not just tasks, to drive your business growth.

IMMEDIATE ACTIONABLE STEPS:

By working through these exercises, you've started building the systems you need to delegate effectively and implement systems that free up your time for higher-level strategy.



ONGOING SUPPORT:

With access to the recording and this workbook, you now have the strategies outlined to put into action as you onboard your own ESP.



Are you ready to take the next step? AssistPro can help **match you with the perfect Executive Support Partner**—so you can start delegating with confidence and focus on **growing your business!**
