

Your Business Administrator Checklist!

ADMINISTRATION/FINANCE

- Manage business inquiries via phone, email and CRM systems
- Books/update client or customer appointments
- Handle basic accounts payable and accounts receivable transactions
- Prepare basic reports and summaries for management review
- Support the budgeting processes and work within your bookkeeper/accountant structure to maintain clear, organized files
- Maintain confidentiality of company financial information
- Help drive continuous process improvements



COMMUNICATIONS/MARKETING

- Plan and execute social/media campaigns to align with existing brand standards
- Create quality content including light copywriting and graphic design to use in blogs, social posts, email newsletters, sales/promotional materials, infographics, etc.
- Create short-form content using Canva, refresh existing content from existing brand guide
- Engage with followers & customers online and in-person events
- Maintaining existing WordPress sites, social media accounts, email/CRM systems
- Manage paid media executions with digital and analog partners
- Coordinate, write and assemble email marketing initiatives

PROJECT/PROGRAM COORDINATION

- Support Owners/Managers with day-to-day project/program development and delivery
- Track project schedules, budgets, and expenditures and assist with project reporting
- Coordinate & update schedules w/tools like Acuity, Jane, Calendly or existing CRM system
- Integrate and revise course content and user-navigation through learning management systems like, Teachable and Thinkific or community platforms like Circle, Mighty Networks
- Research trends, gather insights and statistics relevant to business development, proposals and presentations

CLIENT/CUSTOMER SERVICE

- Ensure clients are set up for success with product/service demos
- Review and guide project plans, aligning strategy, scope, budget, and implementation
- Develop understanding of core organizational workflows, processes and procedures
- Review project scopes, prepare estimates and change orders
- Contribute to annual and strategic planning across client initiatives
- Share client challenges to spark innovation and solution outcomes
- Onboard new clients to organization's product usage/service processes

Highlight the key areas you need support and connect with Trish to hash out a plan!

Service Areas: North Okanagan, South/North Shuswap & Chase



schedule a call with Trish



Text/Call • 403-461-6954