



Stay Focused On
What You Do Best.
Let Office Angels
Handle the Rest!

SMALL BUSINESS SUPPORT CHECKLIST

Administrative Support

- Organize and maintain paper and electronic files
- Schedule appointments
- Return client and vendor calls
- Setup and schedule conference calls
- Send out follow-up email and documents
- Package and mail books and other materials
- Send thank you notes and client appreciation gifts
- Order supplies
- Interface with printers, other vendors, agencies
- Prepare and proofread documents
- Prepare and send mail merges and mass mailings
- Run errands (post office, bank, office supplies)
- Prepare, launch and monitor online surveys
- Research and purchase promotional gifts
- Scan documents
- Burn CDs and make labels
- Prepare binders
- Make travel arrangements
- Design PowerPoint presentations
- Create reports
- Manage client database/CRM
- Create forms, checklists
- Provide project management

Bookkeeping

- Take care of bookkeeping, bill paying, client invoicing, and checkbook balancing
- Assist with billing issues/collections
- Provide financial software setup/tutorials
- Assist with supporting documentation file setup/maintenance

Marketing Assistance

- Execute marketing strategies
- Provide social media assistance (post blog entries, update Facebook, LinkedIn and Twitter)
- Post articles to article banks
- Manage website updates, post video/audio, and transcripts
- Create promotional email broadcasts
- Create e-newsletters; newsletter proofreading, image selection, broadcasting
- Provide promotional materials editing, layout
- Obtain client testimonials

“Our Angel Kathleen is delightful to work with, efficient, professional, timely, pleasant—I could go on and on. Thank you for matching her with us.”

D. King
Evolution Management Inc.

Assessments & Workshop Support

- Place orders for assessments and set clients up to take those assessments
- Manage assessment/workshop pre-work
- Provide registration services
- Send assessment links to attendees
- Follow up to ensure that pre-work is completed prior to event
- Print and bind participant manuals when needed
- Coordinate the inclusion of other marketing materials as appropriate

Speaking/Event Assistance—Planning & Follow-Up

- Research speaking engagement opportunities
- Coordinate event logistics for speaking engagements, tele-classes, and webinars
- Manage post-marketing communication and sales leads follow-up
- Assist at events
- Event planning services
- Registration services

Other Services

- Translations
- Transcriptions
- Legal admin support
- Graphic design
- Web design
- HR support services
- Proposals
- Grant writing
- Business plans
- Office organizing
- Special projects
- Compliance
- Due Diligence
- Research
- Notary
- AND MUCH MORE!

“Having you work with me is holding me accountable to biz goals in a big way. If I'm not spending all of my time either selling or engaging in sales, making revenue targets will be harder to achieve. Knowing that I have your assistance to stay on top of critical sales opportunities is invaluable. You are exactly what I needed—I wish I had done this years ago!” B. Giamanco, Talent Builders, Inc.

“This continues to be a valuable partnership for us. We have succeeded in maintaining an incredibly professional Client Services Team while staffing our organization based on seasonality and maintaining a favorable cost/benefit relationship in the process.” G. Lewis, CPA, The Lewis CPA Firm



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