



ADMIN & CUSTOMER SUPPORT

The Business Admin & Customer Support Delegation Checklist

30 practical tasks you can hand over to create more capacity in your business.

WHO THIS IS FOR

Useful for trades, B2B companies, professional services, agencies, consultants, local businesses and growing SMEs.

Save time

Spot repetitive tasks that do not need to stay on your desk.

Improve response

Create a more consistent customer experience.

Delegate safely

Decide what to hand over, keep, automate or review.

Free practical resource from Arvelane

Why delegation matters

A growing business often reaches a point where the owner or core team is doing too much low-leverage work: answering routine enquiries, chasing information, updating records, booking appointments and keeping on top of admin. The problem is not that these jobs are unimportant - it is that they compete with sales, delivery and growth.

Use this checklist to identify repeatable tasks that can be documented and delegated. Start with work that happens frequently, has a clear outcome and does not require your personal judgement every time.

1. Inbox & communication

CHECK	TASK / QUESTION
☐	Sort and prioritise incoming business email
☐	Reply to routine customer questions using approved templates
☐	Flag urgent, sensitive or high-value enquiries for you
☐	Send follow-up emails after quotes, calls or appointments
☐	Keep shared inbox folders and labels organised
☐	Create and maintain reusable reply templates
☐	Collect missing information from customers or suppliers
☐	Maintain a simple outstanding-actions list

2. Customer support & follow-up

CHECK	TASK / QUESTION
☐	Answer common service, product or availability questions
☐	Handle straightforward booking or appointment enquiries
☐	Send appointment confirmations and reminders
☐	Follow up customers after work, delivery or purchase
☐	Log complaints and escalate them using agreed rules

CHECK	TASK / QUESTION
☐	Track returns, replacements or simple service issues
☐	Respond to website or social media enquiries
☐	Request reviews or feedback after completed work

3. Admin, CRM & business records

CHECK	TASK / QUESTION
☐	Add and update customer or lead records in your CRM
☐	Enter notes after calls or enquiries
☐	Keep spreadsheets and trackers up to date
☐	Prepare standard documents from templates
☐	Organise digital files and folders
☐	Research suppliers, prospects or business information
☐	Maintain booking calendars and appointment records
☐	Compile weekly lists of open tasks, leads or follow-ups

4. Reporting & recurring support

CHECK	TASK / QUESTION
☐	Create a simple weekly activity summary
☐	Track common customer questions and recurring issues
☐	Prepare basic monthly KPI or workload reports
☐	Check that customer records are complete
☐	Maintain recurring admin checklists
☐	Document repeatable processes as simple SOPs

What should you delegate first?

SIGNAL	SCORE 0-5	NOTES
Repetitive work	___/5	
Time-consuming admin	___/5	

SIGNAL	SCORE 0-5	NOTES
Tasks with clear rules	___/5	
Tasks causing slow replies	___/5	
Tasks you regularly postpone	___/5	

Good first-task rule

A strong first delegation task is frequent, easy to explain, easy to quality-check and does not depend on you making a new judgement every time.

Your first five tasks to hand over

TASK	HOW OFTEN?	TIME SPENT	DELEGATE / AUTOMATE / KEEP

Need a hand putting this into action?

Arvelane provides flexible UK-based business support for trades, B2B companies, service businesses, agencies, consultants, online retailers and growing SMEs. You can use us for a few hours of focused support or ongoing monthly capacity.

- Inbox, customer and enquiry support
- Bookings, follow-ups and CRM administration
- Documents, spreadsheets, research and recurring admin
- Flexible support built around your existing processes

A simple next step

If admin & customer support is taking time away from the work only you can do, we can help you build a practical support plan around your business.

Explore Admin & Customer Support at arvelane.co.uk/#/admin-customer-support

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More support. More capacity. More time to grow.

Note: This resource is general practical guidance and is not legal, financial, employment or regulatory advice.