

—— Becca Martin

# Marketing Delegation Cheatsheet

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+ Bonus AI Optimisation  
to use with your team

# This playbook will teach you the simplistic art of identifying, automating and outsourcing the marketing tasks and deliverables in your business

## PURPOSE:

Duplicate yourself to create spaciousness for you to operate in your high-level creative-frequency (*your soul and success requires it*)

## WHY?

- Marketing is the **LIFEFORCE** of every business
- Without marketing, you won't reach your people
- You cannot rely solely on word of mouth

Delegating your marketing activities can be a confronting and overwhelming thought..

This is why I've created the cheatsheet, to break it down simply for you.

You're likely here because you're ready to grow, you're yearning to scale and make more impact and money.. but not in a flimsy way where you feel like things are being held together by duct tape.

You don't have the time to keep grinding away at the repetitive tasks on the backend of your business,

You also don't want to spend \$1000's on softwares, hiring team members and consuming more content...

You're looking for **sustainable growth** and a **back bone** to your business.

One that won't come crashing down when you go for a holiday, OR cost an arm and a leg to establish.

A sustainable business that doesn't rely wholly and solely on you, it runs like a **well oiled** machine with or WITHOUT your presence.

An 8-figure friend of mine recently hit me up with some golden **million-dollar advice**...

He said *theres no secret to scaling a business*..

## IT STARTS WITH

1. **You** → doing all the things
2. **Get clients** → profit increases
3. **Scale** → put profits into growth

## WHEN YOU GET TO SCALE:

1. **Implement systems** → growth engines = predictable and reliable processes
2. **Hire people** → hands on deck for things that can't be automated
3. **Increase capacity** → margins, growth and impact increases
4. **Scale more** → rinse and repeat

## EASY 4-STEP FORMULA

**1 IDENTIFY**  
What are the marketing tasks and processes you're currently doing in your business?

**2 AUTOMATE**  
what can be automated?

**3 DELEGATE**  
Ask yourself "WHO" not "HOW"

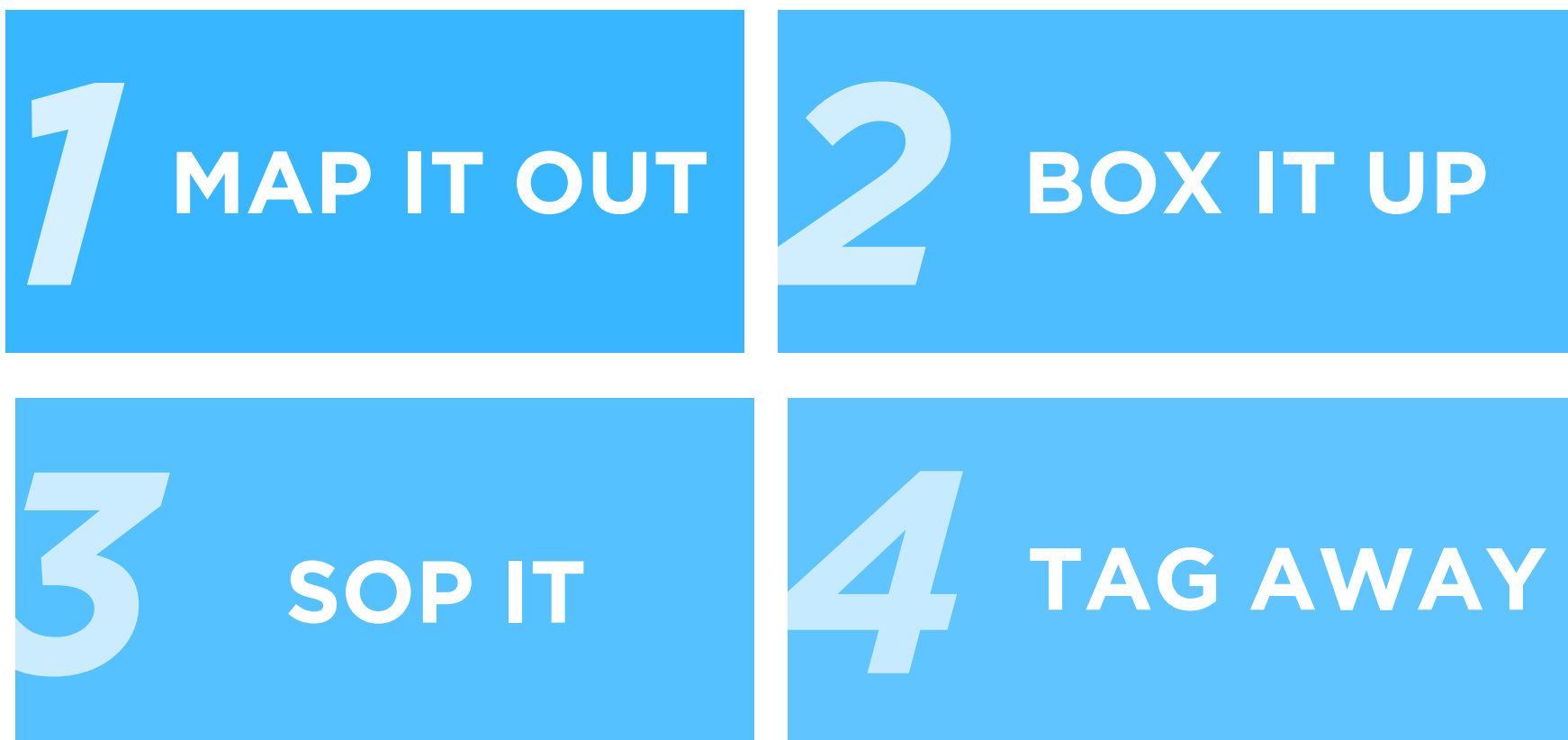
**4 OPTIMISE**  
Make shit work better ;)



*Master your strenghts.  
Outsource your weakness*

**-Ryan Kahn**

# 1 IDENTIFY



## 1. MAP IT OUT

We're creating a marketing growth engine in this section with the duplication formula.

### Why?

A growth engine is like your secret escape route from the daily grind of workflows, tasks, and deliveries - goodbye 60-hour work weeks! It's like crafting a **smart machine** that can handle some of your work on autopilot. But here's the kicker - to make it happen, we must **first identify** the mysteries of our company's inner musings... Once we do that, we unlock the door to greater efficiency and a more enjoyable **life on purpose**. Let's dive in and discover the magic together!

It's time to sit down and get a pen and paper if you're old fashioned, or use the section below in Table B to start writing down every single marketing activity & process that you can think of in your business.

Go to Table A at the bottom of this cheatsheet for our list of top 50 marketing activities to delegate

## ACTION STEP

*Map out and clearly identify every activity & process in  
TABLE B "Cheat Sheet Table" below*

## 2. BOX IT UP

The second step to mapping it out is boxing it up! Or, categorizing. This is where you take a look at everything you've written under the "Cheat Sheet Table" and break it further down into; tasks, subtasks and deliverables.

**Task:** This is the main activity under each pillar  
i.e., "Marketing" you might have "Manage personal IG account"

**Subtask:** This is something more specific within the task, marketing is the trunk of tree, the tasks are the branches, then the subtasks are the leaves.

i.e. The task of "Manage personal IG account" might have subtasks, "respond to follower comments" or "schedule drafted content" or "create 7 reels for next week".

**Deliverables:** Think of this as a simple instruction on how to complete the subtasks.

i.e., the subtask "respond to follower comments" might have "respond to comments using brand tone of voice as per brand playbook - be creative, engaging and unique with responses"

### ACTION STEP

*Take a look at the list of activities you've written under each of the 6 Fundamentals in the previous exercise. Now break down each activity into tasks, subtasks, and deliverables.*



*If your business depends on you, you don't own a business, you own a job and it's the worst job in the world because you are working for a lunatic*

**-MICHAEL E. GERBER, "THE E MYTH REVISITED"**



# 3. SOP IT

## What's an SOP and why have them?

Standard Operating Procedures - the magical key to seamless operations.. Picture it as your secret recipe for success, cleverly crafted to guide your team through the ins and outs of any task or process. This beauty lays down the step-by-step instructions, best practices, and nifty tricks to ensure consistency, efficiency, predictability and top-notch quality in your endeavors.

## What's an SOP and why have them?

Free tools like Asana & Trello are the secret weapon to **supercharging** your SOPs, here's why you should seriously consider using them for your SOPs..

1. **Centralized Hub:** Store all SOPs in one place, no more scattered documents or endless searches.
2. **Collaborative Ease:** Involve teams, assign tasks, and set due dates for seamless teamwork.
3. **Flexibility & Scalability:** Adapt SOPs as your business grows, without any hassle..
4. **Task Automation:** Set up reminders and recurring tasks to save time and focus on important work.
5. **Real-Time Updates:** Stay informed with live progress tracking and prompt issue resolution.
6. **Integration Magic:** Seamlessly link with other tools for a streamlined workflow.

**Real talk:** SOPs generally aren't perfect the first time round. Expect mistakes, expect that the process won't be perfectly executed. The trick is to complete this loop a couple of times (this will optimise it), you'll then end up with a process that is so well defined and easy to follow that anyone can do it.



*The first rule of management is delegation. Don't try and do everything yourself because you can't*

**-ANTHEA TURNER**

☆ **The cool thing about building an SOP index? You can actually delegate this to someone else in your team, like a virtual assistant, or a social media manager.**

**Here's how using the *SOP formula*:**

1. **Choose** the task you want set up for task automation
2. **Screen-record** the processes
3. Give **clear instructions** on how to complete the task (reference deliverables of the subtask)
4. **Send** the video recording to your VA or SMM and have them **upload** the video + task/subtask/deliverable steps into your **SOP index**
5. Have them **set up** task automation and complete the task
6. **Review** how the task was completed, **tweak and clarify** anything that's needed

## **4 Reasons to LOVE SOP's**

1. **Onboarding wizardry;** you're quantum leaping your coworker's success & learning experience by having clear maps for them to follow
2. **You can promote people easily,** as you can find someone more junior to jump in and fulfil the role the promoted staff member was once doing
3. **You can fire when you need to:** Fire fast, hire slow is what my mentor told me. If it's not working out, it makes finding a replacement easier
4. **Your staff have peace of mind:** They are not chained to your business and can take sick days or go for holidays, and you can easily backfill their position with your stellar SOPs!

## ***ACTION STEP***

1. ***Research project management tools to host your SOP index***
2. ***Screen-record 2-3 processes & delegate the SOP formula to a team mate or VA***

**TIP:** Upload your new SOPs to ASANA or TRELLO in an organised format for easy onboarding and training.

**Example** of how this may look on Asana:

Task name	Assignee	Due date	Priority
Post Landing Client			
▶ <input checked="" type="checkbox"/> Completes scheduled call & lands client 3 🗓	Becca Mar...		Medium
<input checked="" type="checkbox"/> Endorses Client to team; Intro to Roni & Adie via FB messenger	Becca Mar...		Medium
<input checked="" type="checkbox"/> Send agreement to client *update HR sheet*	Roni Dungo		High
<input checked="" type="checkbox"/> Receive signed contract	Roni Dungo		Medium
▶ <input checked="" type="checkbox"/> Subscription sign up to Zoho 2 🗓	AB Adie Balilo		High
▶ <input checked="" type="checkbox"/> Clarify Client Requirements 3 🗓	Roni Dungo		Medium
▶ <input checked="" type="checkbox"/> Staff requisition 7 🗓	Roni Dungo		Medium
Add task...			
▶ Post Subscription Sign-up			
▶ Deliverables & Support			

## 4. TAG AWAY

This is where you tag the **importance and urgency** of all tasks and subtasks.

Not only will this help you **gain clarity** on what to delegate, but it will also help you **identify** exactly what **\*you\*** can be channelling your **focus and energy** into to *move the needle forward*.

As the CEO or founder of a company, you don't want to be working on repetitive and low-value tasks. This will help determine what needs to either be **removed, automated or outsourced**.



*Successful delegation required willingness to consistently pass on action, tasks, opportunities, trust and effective communication*

**-TY HOWARD, FOUNDER CEO,  
MOTIVATION MAGAZINE**



# ACTION STEP

*Highlight your tasks & subtasks with different colours based on whether they align with point 1, 2 or 3 above*

## EXAMPLE:

**Pillar:** Marketing

**Task:** Social Media Management

Subtask 1: Scheduling content (1)

Subtask 2: Research trends (2)

Subtask 3: Writing copy (4)

Subtasks 4: Graphic/image marrying (1)

Subtask 5: Monitoring engagement (2)

Subtask 6: Analysis of campaign strategy (4)

I tagged two subtasks as **4 (high value)**, as the strategy and copy are **directly related** to value and revenue-generating activities.

## 2 AUTOMATE

Next, we uncover **what parts of your processes can be automated** so that you can get ready to hire a **Marketing Support VA** to fill the “automation gap”.

### Firstly, why automate?

Needless to say, time is one of our most precious assets (as well as presence IMO).

### Automating allows you to:

1. Unleash efficiency
2. Scale with grace
3. Empowers your team - they can \*also\* focus on higher-leverage tasks
4. Promotes consistency - processes run like clockwork
5. Time-freedom for innovation - create more spaciousness

Automating can be daunting for many of us.. I'm going to desist from getting geeky here and keep it super simple. We've already identified and mapped your processes.

**Next:**

1. **Research:** Do a quick google search and see which one of your softwares and tools can integrate with others i.e."Connect **Active Campaign** with **Calendly + Zapier**" Go to YouTube and type in "Automation workflows for X + Y"
2. **Map the process:** Once you have an idea of whats possible, get clear on your objective and then map out the process.
3. **Test and refine:** Test the automation, monitor results, fine as needed.



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## SOFTWARE MAP FOR BUILDING YOUR ENGINE

We really only need a few simple software and applications to do this efficiently. 5-6 different applications and tools are sufficient to create awesome automated workflows.

Here's a list of software and applications we use:

### DATA COLLECTION

- Google Forms
- Typeform

### DATA STORAGE

- Google Sheets
- Asana
- Trello

### DATA MANAGEMENT

- Zapier
- SMTP server Google Docs



*When you delegate work to a member of the team, your job is to clearly frame success and describe the objectives.*

**-STEVEN SINOFSKY, FORMER MICROSOFT EXECUTIVE**

# 3 DELEGATE

## DELEGATE YOUR PROCESSES

Delegating covers the parts of your process that cannot be **automated or removed**. It's to fill the "automation gap". The automation gap is a term used for the gap where automation won't work, at least not with the current technology available.

When outsourcing, this means **leveraging outsourced resources** such as virtual professionals and freelancers, not simply hiring local employees.

This is not to say you can't hire local staff (I now have staff in both Australia and the Phillipines), however it is a fantastic option to **reduce overhead costs, [you can find more of the benefits here.](#)**

Some of the most **successful companies** in the world leverage **hybrid staffing models** using both local and internal talent such as Google, Amazon, Shopify, HubSpot, Zapier & Basecamp to name a few.

Once you've identified the Marketing role your company needs most to move the needle forward and create more time freedom for yourself, *it's time to crunch your numbers* and get a **budget** together.



*If you don't know your numbers, you  
don't know your business*  
**-Marcus Lemonsis**

Once you've had a look at your numbers and you have a **budget**, you need to **consider the hours you will be hiring someone for** in an ongoing position - this is very important.

## Some questions to ask yourself to gauge this

- How long does task XYZ take me?
- Am I looking to manage my marketing, or uplevel my marketing?
- How important is this role to our success?
- What is your budget for this role? Consider the financial feasibility of hiring someone for the required number of hours per week.
- Can the role be adjusted or scaled up/down in the future based on business demands? Think about the flexibility needed for potential changes in workload.

**Part Time:** Starts at 15-20 hours per week - from experience, I wouldn't go less than this, productivity and quality of deliverables and results tend to drop.

**Full Time:** 40 hours per week.

## STAFFING PLAN

When it comes to scaling your processes, it's helpful to look at a staffing plan.

Helpful questions to map this:

1. Who do you have onboard right now? (if you're solo, this is all good, too)
2. Are all of them required?
3. Do you need anyone else?

If you go back and take a look at your marketing processes, is your company at a scale where you need more **managers?**

If so, who, where and what would they do? This is a fairly important question, as having the required resources around is crucial when scaling, as things will most likely break. Another element of a staffing plan is to identify tasks and activities you yourself are performing, that you don't really want to do.



## Can it be automated or outsourced?

If not, **hire a manager**, someone who can do higher valuable tasks than that of a generalist.

**I.E.** You might hire a marketing manager who oversees a social media manager, digital marketer & podcast producer in your time.

The next steps are exciting, getting to the hiring and recruitment!

→ Decide if you want to **go through a company** who will do the heavy lifting of recruitment & HR for you,

→ or if **you will be the recruiter and HR yourself.**

## WHERE TO FROM HERE?

1. Want to see if you qualify to connect with our Top 1% of pre-vetted highly qualified Marketing VAs? **Let's catch up here**
2. Check out **Becca's YouTube Channel** for all things scaling with VA's - all our tips & tricks, VA & HR hacks, systems, processes & strategies
3. Join our growing community **Scaling with Virtual Assistants** for exclusive access to our secrets to scaling & building your dream team.

# 4 OPTIMIZE

There's a lot to say on optimising processes. As mentioned earlier when we were identifying your processes, optimising can be done by following these simple steps - and rinsing and repeating them.

**Choose** the task you want setup for task automation

1. **Screen-record** the processes
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## Bonus ChatGPT Optimising:

I decided to share this when I gained a lot of interest around a post I did regarding my Social Media Manager creating content for me that sounded **more like me**, than **\*me\***.

### Why use Chatty G with your Marketing VA?

- In short, it **revolutionizes** your content creation and engagement
- Saves you MAD amounts of **time** revising drafts and having to tweak campaigns (delegating content and copy is one of the most difficult things to outsource)
- Marketing VAs can use ChatGPT to **brainstorm** ideas and draft posts, generate **engaging** on-point-brand responses, **speed up** the process and **diversify** content.

### Train ChatGPT to write in your style

- First, **provide instructions to ChatGPT** to learn the style, tone and nuances of your personal brand or business brand

#### Prompt:

Today, you will emulate the voice of **(person or brand you want GPT to copy)**. Do you understand?

#### Sample:

Today, you will emulate the voice of **Becca Martin, Director and Creator of The Speed Up Co.** Do you understand?

### Next Prompt:

I want you to analyze **Becca's** previous written work. Study it in-depth and absorb its style. Familiarize yourself with her writing mannerisms. Systematically analyze the text so that you can later write in the style of **Becca Martin**.

Here is the piece of text I want you to analyze:

**(Paste the copy here)**

**Note:** Repeat this at least 10 times to ensure GPT has a thorough understanding of the desired writing style

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# TABLE A

## SOCIAL MEDIA MANAGEMENT

- Social media content creation and scheduling.
- Social media Engagement and community management.
- Social media advertising targeting and optimization.
- Designing and managing customer loyalty programs.
- Managing customer support through social media.
- Setting up and managing referral programs.
- Influencer marketing outreach and collaboration.
- Social media analytics and performance reporting.
- Trend monitoring and real-time social media engagement.
- Social media contests and giveaways.
- Influencer tracking and ROI analysis.
- Cross-promotion with complementary businesses.
- Social media trend analysis and reporting.
- Hashtag research and strategy implementation.
- Social media ad campaign creative development.
- Social media audience research and targeting.
- Social media campaign monitoring and optimization.
- Social media post scheduling and monitoring tools management.
- User-generated content curation and utilization.
- Social media platform-specific strategy development.

## CONTENT MANAGEMENT

- Blog writing and content marketing.
- E-book creation and design.
- Podcast production and promotion.
- Newsletter design and distribution.
- Content curation and sharing on social media.
- Guest blogging and content partnerships.
- Content performance analysis and reporting.
- Editorial calendar planning and management.
- SEO-optimized content planning and execution.
- Video content creation and distribution.

## DIGITAL MARKETING

- Paid advertising campaign management (Google Ads, Facebook Ads, etc.).
- Search engine optimization (SEO) research and implementation.
- Keyword research for SEO and PPC.
- A/B testing of marketing campaigns.
- Marketing analytics and performance reporting.
- SMS and push notification marketing.
- Lead generation campaign development and execution.
- Conversion rate optimization (CRO) strategies.
- Website and landing page optimization.



# TABLE B

**SOCIAL MEDIA  
MANAGEMENT**

**CONTENT  
MANAGEMENT**

**DIGITAL  
MARKETING**

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