

268 Tasks You Can Outsource to Virtual Assistants



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GENERAL ADMIN

EMAIL MANAGEMENT	DOING NOW	WANT TO DO	N/A
Organise and categorise emails according to priority and urgency.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Draft responses in a professional yet friendly tone suitable for Australian communication styles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unsubscribe from irrelevant subscriptions and manage newsletters.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CALENDAR MANAGEMENT	DOING NOW	WANT TO DO	N/A
Schedule appointments and meetings, considering Australian time zones (AEST, ACST, AWST).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send out calendar invites using Australian public holidays and business hours.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinate schedules for team members, especially during daylight saving changes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATA ENTRY	DOING NOW	WANT TO DO	N/A
Input and update data into Australian-specific software or databases (e.g., MYOB, Xero).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure compliance with Australian data privacy laws when handling sensitive information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain and organise digital filing systems, ensuring access for relevant parties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOCUMENT PREPARATION	DOING NOW	WANT TO DO	N/A
Create and format documents according to Australian standards (e.g., APA referencing).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proofread documents for clarity, grammar, and adherence to Australian English conventions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convert documents to the required formats (e.g., PDF for formal submissions).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GENERAL ADMIN

RESEARCH	DOING NOW	WANT TO DO	N/A
Conduct research on Australian markets, competitors, and industry trends.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gather information on government regulations that may affect the business (e.g., Fair Work, Australian Taxation Office).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compile reports or presentations that reflect Australian cultural and legal contexts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOCIAL MEDIA MANAGEMENT	DOING NOW	WANT TO DO	N/A
Schedule and post content on Australian platforms and times for maximum engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor comments and messages, responding in a friendly and culturally aware manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assist in creating a content calendar that aligns with Australian holidays and events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT COMMUNICATION	DOING NOW	WANT TO DO	N/A
Manage communication with Australian clients and stakeholders, adhering to local etiquette.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare and send out newsletters, updates, or promotional materials that resonate with the Australian audience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handle enquiries and provide support with an understanding of local services and products.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROJECT MANAGEMENT	DOING NOW	WANT TO DO	N/A
Assist in planning and organising projects using Australian project management software (e.g., Wrike, Monday.com).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track project timelines and deadlines, considering public holidays and seasonal availability.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilitate team collaboration, especially in remote or distributed teams across Australia.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GENERAL ADMIN

FINANCIAL MANAGEMENT	DOING NOW	WANT TO DO	N/A
Manage invoicing and billing processes using Australian accounting software.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track expenses, ensuring compliance with GST regulations and tax requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare financial reports or summaries for stakeholders, adhering to Australian financial practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRAVEL ARRANGEMENTS	DOING NOW	WANT TO DO	N/A
Research and book flights, accommodations, and transportation within Australia.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare itineraries that include local travel tips and recommendations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure compliance with any travel restrictions or regulations relevant to Australian travel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CUSTOMER SUPPORT	DOING NOW	WANT TO DO	N/A
Provide customer support via phone, email, or chat, using Australian service standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handle enquiries, complaints, and feedback with a focus on resolution and customer satisfaction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain a record of customer interactions and follow-up actions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVENT PLANNING	DOING NOW	WANT TO DO	N/A
Assist in planning and organising virtual or in-person events (e.g., conferences, webinars) tailored to Australian audiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinate logistics such as venue selection, catering, and technology setup.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage RSVPs and communication with attendees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTOMER SERVICE

CUSTOMER INQUIRY MANAGEMENT	DOING NOW	WANT TO DO	N/A
Respond promptly to customer enquiries via phone, email, and social media.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use a friendly, approachable tone that reflects Australian communication styles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide clear and accurate information about products, services, and policies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CALL HANDLING	DOING NOW	WANT TO DO	N/A
Manage incoming calls, ensuring a professional greeting and prompt assistance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use active listening skills to understand customer needs and resolve issues effectively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document call details in the customer relationship management (CRM) system for future reference.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPLAINT RESOLUTION	DOING NOW	WANT TO DO	N/A
Address customer complaints with empathy and a focus on resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow established protocols for escalating issues when necessary, maintaining a calm demeanor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keep records of complaints and resolutions to identify trends and improve service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PRODUCT KNOWLEDGE	DOING NOW	WANT TO DO	N/A
Maintain up-to-date knowledge of products and services to provide accurate information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educate customers about features, benefits, and usage of products in a way that is relatable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offer assistance with troubleshooting and usage enquiries, ensuring customers feel supported.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTOMER SERVICE

ORDER PROCESSING	DOING NOW	WANT TO DO	N/A
Assist customers with placing orders, including upselling and cross-selling where appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure accuracy in taking orders and processing transactions, adhering to Australian payment regulations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicate order confirmation and shipping details in a timely manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CUSTOMER FEEDBACK COLLECTION	DOING NOW	WANT TO DO	N/A
Solicit feedback from customers through surveys or direct communication.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analyse feedback to identify areas for improvement in products or services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Report insights to management to inform business decisions and strategies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOLLOW-UP COMMUNICATION	DOING NOW	WANT TO DO	N/A
Conduct follow-up calls or emails to ensure customer satisfaction after a purchase or interaction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remind customers about upcoming appointments, renewals, or promotions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thank customers for their business and encourage repeat purchases.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOCIAL MEDIA ENGAGEMENT	DOING NOW	WANT TO DO	N/A
Monitor and manage comments, messages, and reviews on social media platforms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respond to enquiries and issues raised on social media in a timely and professional manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engage with customers in discussions and share relevant content to build community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTOMER SERVICE

TECHNICAL SUPPORT	DOING NOW	WANT TO DO	N/A
Provide basic technical support for products and services as required.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Troubleshoot common issues and guide customers through resolution steps.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escalate complex technical issues to the appropriate team or department.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create and share resources such as FAQs, how-to guides, and tutorials tailored for Australian customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host webinars or online workshops to educate customers about products or services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keep resources updated based on common customer enquiries and feedback.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LOYALTY PROGRAM MANAGEMENT	DOING NOW	WANT TO DO	N/A
Assist customers in understanding and enrolling in loyalty or rewards programmes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track customer participation and engagement in loyalty programmes, promoting benefits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address enquiries related to programme rewards, points, and redemption processes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CULTURAL SENSITIVITY AND INCLUSIVITY	DOING NOW	WANT TO DO	N/A
Be aware of and respect the diverse cultural backgrounds of Australian customers, including Indigenous communities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure communication is inclusive and sensitive to various cultural perspectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adapt service approaches to meet the unique needs of different customer demographics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTOMER SERVICE

COMPLIANCE AND SECURITY AWARENESS	DOING NOW	WANT TO DO	N/A
Adhere to Australian privacy laws and regulations when handling customer data (e.g., Privacy Act).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure secure handling of customer information and transactions to foster trust.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stay informed about updates to compliance requirements and best practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REPORTING AND ANALYTICS	DOING NOW	WANT TO DO	N/A
Compile reports on customer service performance metrics (e.g., response time, customer satisfaction).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analyse data to identify trends, issues, and areas for improvement in service delivery.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Present findings to management to support decision-making and strategic planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRAINING AND DEVELOPMENT	DOING NOW	WANT TO DO	N/A
Participate in ongoing training to enhance customer service skills and product knowledge.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Share knowledge and best practices with team members to promote a culture of continuous improvement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stay informed about industry trends and customer service innovations relevant to the Australian market.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DIGITAL MARKETING

CONTENT CREATION	DOING NOW	WANT TO DO	N/A
Develop engaging and relevant content tailored to the Australian audience, including text, images, and videos.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adhere to brand guidelines while showcasing local culture and trends in social media posts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create graphics and multimedia content using tools like Canva or Adobe Creative Suite.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOCIAL MEDIA MANAGEMENT	DOING NOW	WANT TO DO	N/A
Manage various social media platforms (Facebook, Instagram, Twitter, LinkedIn, TikTok, etc.) for the brand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule and publish posts using social media management tools (e.g., Hootsuite, Buffer).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor and respond to comments, messages, and mentions in a timely manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AUDIENCE ENGAGEMENT	DOING NOW	WANT TO DO	N/A
Foster a community by engaging with followers through comments, direct messages, and interactive content (polls, Q&As).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organise and run contests, giveaways, or challenges that resonate with local audiences.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Build relationships with local influencers and brands for potential partnerships.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TREND MONITORING	DOING NOW	WANT TO DO	N/A
Stay updated on social media trends and popular culture in Australia to maintain relevance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track competitor activity and analyse their social media strategies for insights.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participate in trending conversations and hashtags that align with the brand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DIGITAL MARKETING

ANALYTICS AND REPORTING	DOING NOW	WANT TO DO	N/A
Use social media analytics tools to track performance metrics (engagement, reach, impressions).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare regular reports summarising social media performance and providing actionable insights.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analyse customer feedback and engagement metrics to optimise future content strategies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PAID ADVERTISING MANAGEMENT	DOING NOW	WANT TO DO	N/A
Assist in creating and managing social media advertising campaigns (Facebook Ads, Instagram Ads).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor ad performance, adjust targeting, and optimise budget allocation based on performance data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaborate with the marketing team to develop promotional strategies for upcoming campaigns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMUNITY MANAGEMENT	DOING NOW	WANT TO DO	N/A
Monitor brand reputation on social media by tracking mentions, reviews, and feedback.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address customer inquiries and concerns on social platforms, providing timely and helpful responses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implement strategies to enhance positive community engagement and manage any negative responses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DIGITAL MARKETING

CONTENT CALENDAR DEVELOPMENT	DOING NOW	WANT TO DO	N/A
Develop and maintain a content calendar that aligns with marketing goals and seasonal trends in Australia.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinate with other marketing team members to ensure consistency across all channels.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule themed posts based on Australian holidays, events, and cultural significance (e.g., Australia Day, Anzac Day).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEO AND HASHTAG STRATEGY	DOING NOW	WANT TO DO	N/A
Research and implement relevant hashtags to increase post visibility and engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Optimise social media profiles and posts for search engines to improve organic reach.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor hashtag performance and adjust strategy accordingly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BRAND COLLABORATION	DOING NOW	WANT TO DO	N/A
Identify and reach out to local influencers for collaboration opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinate joint campaigns, giveaways, or events with other brands that align with company's values.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage relationships and communication with collaborators.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRISIS MANAGEMENT PREPAREDNESS	DOING NOW	WANT TO DO	N/A
Be prepared to manage social media crises by monitoring conversations and identifying potential issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assist in drafting communication plans to address negative feedback or public relations issues on social media.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with the marketing team to ensure consistent messaging during crises.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DIGITAL MARKETING

USER-GENERATED CONTENT (UGC) STRATEGY	DOING NOW	WANT TO DO	N/A
Encourage and curate user-generated content from customers to enhance brand authenticity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Run campaigns that invite customers to share their experiences with the brand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Showcase UGC on social media to foster community and engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RESEARCH AND DEVELOPMENT	DOING NOW	WANT TO DO	N/A
Conduct market research to identify trends, customer preferences, and competitor strategies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stay informed about changes in social media algorithms and best practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explore new platforms or technologies that may benefit the brand's social media strategy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRAINING AND DEVELOPMENT	DOING NOW	WANT TO DO	N/A
Participate in training sessions to stay updated on social media marketing trends and tools.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Share new insights and knowledge with the team to enhance overall capabilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend local industry events or webinars to network and learn from peers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPLIANCE AWARENESS	DOING NOW	WANT TO DO	N/A
Ensure all social media activities comply with Australian regulations and advertising standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Be aware of privacy laws and guidelines related to data collection and customer engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor compliance in influencer partnerships and sponsored content.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

BRANDING & BRAND GUIDE DEVELOPMENT

BRAND STYLE GUIDE CREATION	DOING NOW	WANT TO DO	N/A
Creating visual mood boards and sample templates to guide future content creation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logo & Visual Asset Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brand Colours & Typography, Choosing fonts and typography guidelines that align with brand personality and readability standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Template Creation & Visual Consistency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brand Messaging & Voice Documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset Storage & Organisation, Setting up cloud storage (e.g., Google Drive, Dropbox) for easy access to brand assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CONTENT WRITING

BLOG & ARTICLE WRITING	DOING NOW	WANT TO DO	N/A
Researching topics, keywords, and trends to produce informative and engaging blog posts and article	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crafting compelling headlines and introductions to boost reader engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Editing and proofreading to ensure clarity, grammar, and adherence to style guidelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WEBSITE COPYWRITING	DOING NOW	WANT TO DO	N/A
Creating persuasive website copy for landing pages, service descriptions, and about pages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conducting keyword research to optimise web copy for search engines (SEO)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Updating existing website content for relevance and consistency with the brand's messaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOCIAL MEDIA CONTENT CREATION	DOING NOW	WANT TO DO	N/A
Writing engaging social media posts tailored to specific platforms (e.g., Facebook, Instagram, LinkedIn)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Developing content calendars for consistent posting and thematic campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating graphics or visuals to accompany written content for improved engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EDITING & PROOFREADING	DOING NOW	WANT TO DO	N/A
Reviewing and editing content for coherence, tone, and consistency with brand guidelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checking for grammatical errors, typos, and formatting issues before publication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EMAIL MARKETING

EMAIL MARKETING MANAGEMENT AND EMAIL NEWSLETTERS	DOING NOW	WANT TO DO	N/A
Developing new subscriber lists based on defined audience segments (e.g., demographics, behaviour).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regularly updating and cleaning lists to maintain data quality by removing duplicates and inactive contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adding and Removing Subscribers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Designing and scheduling targeted broadcast emails to promote new content, products, or events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establishing a consistent schedule for newsletter distribution to keep subscribers informed and engaged.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sign-Up Forms, Testing form functionality and user experience to maximise conversion rates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Generating detailed reports to analyse the performance of newsletters and broadcast emails.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WEB DEVELOPMENT TASKS (WORDPRESS)

WEBSITE SUPPORT AND DEVELOPMENT	DOING NOW	WANT TO DO	N/A
WordPress Installation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plugin and Theme Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performing regular content updates and ensuring site security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Gateway Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CONTENT MANAGEMENT, INTEGRATION AND TRACKING	DOING NOW	WANT TO DO	N/A
Blog Management, Creating and publishing blog posts, ensuring SEO best practices are followed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customising WordPress themes to align with brand identity and user experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Connecting social media platforms to the website for improved engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analytics and Reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PARAPLANNING

CLIENT DATA MANAGEMENT	DOING NOW	WANT TO DO	N/A
Collecting and organising client information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintaining up-to-date client records in CRM systems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RESEARCH AND ANALYSIS	DOING NOW	WANT TO DO	N/A
Conducting research on investment products, superannuation funds, and insurance policies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analysing client portfolios and providing insights.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PREPARATION OF FINANCIAL DOCUMENTS	DOING NOW	WANT TO DO	N/A
Drafting Statements of Advice (SoAs) and other financial documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating and formatting presentation materials for client meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPLIANCE AND REGULATORY CHECKST	DOING NOW	WANT TO DO	N/A
Ensuring all documentation complies with relevant regulations and standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting with the preparation of compliance reports.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT COMMUNICATION	DOING NOW	WANT TO DO	N/A
Drafting emails and correspondence to clients.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scheduling client meetings and follow-ups.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PARAPLANNING

BUDGETING AND FORECASTING	DOING NOW	WANT TO DO	N/A
Assisting with cash flow analysis and budgeting tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparing financial projections based on client information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REPORT GENERATION	DOING NOW	WANT TO DO	N/A
Compiling and generating financial reports for clients and advisors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating performance review summaries for investment portfolios.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOFTWARE MANAGEMENT	DOING NOW	WANT TO DO	N/A
Using financial planning software (e.g., Xplan, AdviserLogic) to input and analyse data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeping up with updates and changes in financial planning software tools.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MARKET TRENDS MONITORING	DOING NOW	WANT TO DO	N/A
Keeping track of financial market trends and news that may impact client portfolios.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reporting relevant findings to financial advisors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRAINING AND SUPPORT	DOING NOW	WANT TO DO	N/A
Providing administrative support for training sessions related to financial products and services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting with onboarding new clients by providing them with necessary information and resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PARAPLANNING

TASK MANAGEMENT	DOING NOW	WANT TO DO	N/A
Organising and prioritising tasks for financial planners.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking deadlines and follow-ups on action items.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOCUMENTATION AND FILING	DOING NOW	WANT TO DO	N/A
Managing and organising digital files and documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensuring that all client documentation is properly filed for easy access.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FINANCIAL PLANNING ADMIN

ADMINISTRATIVE SUPPORT	DOING NOW	WANT TO DO	N/A
Managing calendars and scheduling appointments for financial planners.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handling incoming calls and emails, responding to inquiries, and directing them appropriately.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintaining and organising digital files and documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT MANAGEMENT	DOING NOW	WANT TO DO	N/A
Assisting with onboarding new clients, including collecting and organising necessary documentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Updating client information in CRM systems and ensuring data accuracy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending out client welcome packages or informational materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MARKETING ASSISTANCE	DOING NOW	WANT TO DO	N/A
Creating and managing social media content and posts to enhance online presence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting with email marketing campaigns, including drafting and sending newsletters.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinating events, webinars, or workshops for client engagement and education.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RESEARCH SUPPORT	DOING NOW	WANT TO DO	N/A
Conducting market research on financial products, services, or industry trends.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gathering information for financial planners to use in client presentations or recommendations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FINANCIAL PLANNING ADMIN

DOCUMENT PREPARATION	DOING NOW	WANT TO DO	N/A
Drafting and formatting client reports, presentations, and other documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparing meeting agendas and minutes for team meetings or client meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT COMMUNICATION	DOING NOW	WANT TO DO	N/A
Drafting and sending follow-up emails to clients after meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordinating reminders for upcoming appointments or deadlines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TASK AND PROJECT MANAGEMENT	DOING NOW	WANT TO DO	N/A
Using project management tools to track tasks and deadlines for financial planners.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting in the prioritisation and organisation of tasks and projects.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BOOKKEEPING AND FINANCIAL RECORD KEEPING	DOING NOW	WANT TO DO	N/A
Assisting with basic bookkeeping tasks, such as invoicing clients and tracking expenses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing receipts and documentation for financial records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRAINING AND DEVELOPMENT SUPPORT	DOING NOW	WANT TO DO	N/A
Scheduling training sessions or professional development opportunities for the financial planning team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compiling resources and materials for ongoing education.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FINANCIAL PLANNING ADMIN

TECHNOLOGY SUPPORT	DOING NOW	WANT TO DO	N/A
Assisting with the management of software tools and platforms used in financial planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Troubleshooting basic technical issues or coordinating IT support as needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPLIANCE AND REGULATORY ASSISTANCE	DOING NOW	WANT TO DO	N/A
Helping to ensure that all communications and documentation meet compliance requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting in preparing documentation for audits or compliance checks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT FEEDBACK AND SURVEYS	DOING NOW	WANT TO DO	N/A
Designing and distributing client feedback surveys to gather insights and improve services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analysing feedback and preparing summaries for financial planners.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MORTGAGE BROKING – LOAN PROCESSING

DOCUMENT COLLECTION AND VERIFICATION	DOING NOW	WANT TO DO	N/A
Gathering required documentation from clients, such as pay slips, bank statements, and identification.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Verifying the accuracy and completeness of documents received for loan applications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DATA ENTRY	DOING NOW	WANT TO DO	N/A
Inputting client information and loan application details into loan management software or CRM systems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintaining accurate records of all client interactions and documentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PRELIMINARY ASSESSMENTS	DOING NOW	WANT TO DO	N/A
Conducting initial assessments of loan applications based on lender criteria.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifying any missing documents or information and following up with clients.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUBMISSION OF LOAN APPLICATIONS	DOING NOW	WANT TO DO	N/A
Preparing and submitting loan applications to lenders on behalf of clients ensuring compliance with lender requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing the submission process to ensure timely submissions and follow-ups.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMUNICATION WITH CLIENTS	DOING NOW	WANT TO DO	N/A
Keeping clients informed about the status of their loan applications, including any requirements or additional documentation needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Answering client inquiries regarding the loan process and providing updates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MORTGAGE BROKING – LOAN PROCESSING

LIAISON WITH LENDERS AND OTHER STAKEHOLDERS	DOING NOW	WANT TO DO	N/A
Communicating with lenders, real estate agents, and other relevant parties to facilitate the loan process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Following up on outstanding inquiries or requests from lenders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FILE MANAGEMENT	DOING NOW	WANT TO DO	N/A
Organising and maintaining electronic files related to loan applications, ensuring that all documents are stored securely and are easily accessible.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparing loan files for review and submission to compliance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPLIANCE CHECKS	DOING NOW	WANT TO DO	N/A
Assisting in ensuring that loan applications meet all regulatory and compliance requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeping up-to-date with changes in lending regulations and policies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
POST-APPROVAL FOLLOW-UP	DOING NOW	WANT TO DO	N/A
Assisting with the coordination of post-approval processes, such as settlement arrangements and documentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicating with clients regarding any final steps needed before settlement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT ONBOARDING	DOING NOW	WANT TO DO	N/A
Assisting with the onboarding process of new clients, including setting up client profiles and organising initial consultations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending welcome emails and introductory materials to new clients.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MORTGAGE BROKING – LOAN PROCESSING

CRM MANAGEMENT	DOING NOW	WANT TO DO	N/A
Updating and maintaining the CRM system with client interactions, notes, and follow-up tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Generating reports on interactions, application statuses, and performance metrics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOCIAL MEDIA AND MARKETING SUPPORT	DOING NOW	WANT TO DO	N/A
Assisting in the creation and scheduling of social media posts to promote mortgage broking services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helping with the preparation of marketing materials, newsletters, and client communication.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APPOINTMENT SCHEDULING	DOING NOW	WANT TO DO	N/A
Scheduling appointments for loan processing meetings with clients and lenders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending calendar invites and reminders for upcoming meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RESEARCH AND MARKET ANALYSIS	DOING NOW	WANT TO DO	N/A
Conducting research on current market trends, interest rates, and lender offerings to provide insights for clients.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gathering information new loan products or changes in lending criteria.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TASK MANAGEMENT	DOING NOW	WANT TO DO	N/A
Assisting with task prioritisation and management using project management tools.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking deadlines for loan applications and follow-up tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MORTGAGE BROKING – CREDIT ANALYSIS

DATA GATHERING AND ANALYSIS	DOING NOW	WANT TO DO	N/A
Collecting and organising data relevant to loan applications, including client financials and credit histories.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting in the analysis of borrower creditworthiness and risk assessment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREDIT REPORT RETRIEVAL	DOING NOW	WANT TO DO	N/A
Obtaining credit reports and ensuring they are accurate and up-to-date.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewing credit reports for discrepancies and preparing summaries for further analysis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FINANCIAL STATEMENT REVIEW	DOING NOW	WANT TO DO	N/A
Assisting in the evaluation of clients' financial statements, including income, assets, and liabilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comparing current financial data against industry benchmarks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RISK ASSESSMENT	DOING NOW	WANT TO DO	N/A
Supporting the development of risk analysis reports for loan applications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting in identifying potential red flags or issues that may affect loan approval.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOCUMENT PREPARATION	DOING NOW	WANT TO DO	N/A
Preparing necessary documentation for internal review, including credit analysis summaries and recommendations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting in the compilation of credit files for compliance audits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MORTGAGE BROKING – CREDIT ANALYSIS

COMPLIANCE MONITORING	DOING NOW	WANT TO DO	N/A
Coordinating communication with lenders for any additional information or clarification needed for credit assessments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Following up with lenders on outstanding queries related to loan applications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LENDER COMMUNICATION	DOING NOW	WANT TO DO	N/A
Coordinating communication with lenders for any additional information or clarification needed for credit assessments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Following up with lenders on outstanding queries related to loan applications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT FOLLOW-UP	DOING NOW	WANT TO DO	N/A
Communicating with clients regarding any additional information required for credit assessment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeping clients informed about the progress of their applications and any decisions made.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT QUERIES	DOING NOW	WANT TO DO	N/A
Answering clients' questions about the credit assessment process and providing updates on their application status.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APPOINTMENT SCHEDULING	DOING NOW	WANT TO DO	N/A
Organising meetings or consultations between credit analysts and clients or lenders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending reminders for upcoming appointments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MORTGAGE BROKING – CREDIT ANALYSIS

CRM MANAGEMENT	DOING NOW	WANT TO DO	N/A
Updating and maintaining the CRM system with relevant client information and notes from credit assessments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Generating reports on application statuses, credit assessments, and performance metrics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TASK MANAGEMENT	DOING NOW	WANT TO DO	N/A
Assisting in managing tasks and deadlines for credit analysis projects using project management tools.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeping track of pending tasks and ensuring timely completion.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MARKET RESEARCH	DOING NOW	WANT TO DO	N/A
Conducting research on current lending trends, interest rates, and competitor offerings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compiling market reports that can assist credit analysts in making informed decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REPORT GENERATION	DOING NOW	WANT TO DO	N/A
Assisting in the preparation of credit analysis reports and presentations for internal stakeholders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Summarising findings and insights from credit assessments for management review.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FEEDBACK AND IMPROVEMENT	DOING NOW	WANT TO DO	N/A
Collecting feedback on the credit assessment process to identify areas for efficiency improvements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assisting in the development of best practices for credit analysis and reporting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>