



CORE SERVICE CATALOG

As of September 1, 2025

Service Categories and tasks

Administrative Support

- Calendar Management
- Data Entry
- Document Preparation
- Inbox Management
- Meeting Scheduling
- Organizing Records & Files
- Travel Planning
- Website / Intranet / SharePoint Updates

Business Development & Client Support

- Create Client Proposals and Agreements
- Manage Client Communications
- Onboarding of Clients

Compliance & Reporting

- Ensure Documents are Compliant with Regulations
- Filing and Version Control of Documents
- Shredding of Confidential Documents

Customer Service	<ul style="list-style-type: none"> • Call Center Support • Follow up with Leads and Track Conversations • Guide Customers through Technical or Product Questions • Handle Customer Enquiries or Complaints • Maintain Positive Client Relationships • Process Returns & Exchanges
Data Analysis	<ul style="list-style-type: none"> • Analyze Data and Create Executive Reports • Collect, Analyze and Report Financial Data
Event Support	<ul style="list-style-type: none"> • Assist with Planning Events • Coordinate Travel Arrangements for individuals or groups • Enter Trade Show Leads into CRM • Logistics Planning • Vendor Communication
Finance Support	<ul style="list-style-type: none"> • Accounts Receivable, Fee Collection, Deposits and reconciliation
Home & Business Design Services*	<ul style="list-style-type: none"> • Plan and implement staging, design and home, office and studio aesthetics
Home Repair Coordination*	<ul style="list-style-type: none"> • Act as Liaison with Contractor to Project-Manage Repairs to Completion

Marketing & Content	<ul style="list-style-type: none"> • Contribute to Marketing Messaging for Products, Packages and Services • Draft Social Media Content Ideas
Procurement Support	<ul style="list-style-type: none"> • Administer Supplier Portal Handbook, Revision Control • Contract Liaison (Review, Upload Terms, Summarize Agreements)
Project Management	<ul style="list-style-type: none"> • Tracking Milestones and Deadlines • Coordinating People, Processes and Tasks to Completion
Remote Training	<ul style="list-style-type: none"> • Conduct Live Virtual Training Sessions • Create AI-based Training Material and Courses • Provide Follow-Up Q&A and Live One-on-One Training • Record and Edit Training Videos
Short-term Rental Management*	<ul style="list-style-type: none"> • Co-host STRs and Act as Liaison with Guests and Contractors
Small Business Support	<ul style="list-style-type: none"> • Assist with Book-keeping Setup and Support • Assist with Online Store Order Management • Inventory Updates
Social Media & Digital Marketing	<ul style="list-style-type: none"> • Assist with Social Media Strategy and Content Calendar • Create & Post Content Regularly on Social Channels • Design Graphics in Canva • Engage with Followers, Comment, Like, Respond to Questions

Tax Preparation & Finance	<ul style="list-style-type: none"> • Bookkeeping & Expense Tracking • Manage Seasonal Tax Workload • Organize Financial Records for Tax Season • Prepare Personal Tax Returns • Prepare Small Business Tax Returns • Review Past Tax Returns for Accuracy
Technical Support	<ul style="list-style-type: none"> • Provide Software Installation & Configuration • Remote Troubleshooting via Phone, Chat or Video • Setup Email Accounts, Domains and Hosting • Troubleshoot Customer Technical Issues
Website Design & Management	<ul style="list-style-type: none"> • Create & Update Website Graphics • Customize Wix/WordPress/SquareSpace Sites • Design & Build Website Layouts • Integrate Plugins, Payment Systems and Booking Tools • Optimize Site for Mobile and SEO • Upload and Format Content

* - These are Local Tasks only. To see VA Locations for Local Tasks, see our VA Location Guide.