MY TASKER 360

FREE TRADIE GUIDE

The Tradie Admin Handover Checklist

40 admin tasks Australian trade businesses hand over first, sorted by area, plus a simple 4-step method to hand over any task without writing a training manual.

How to use this checklist

Tick every task you (or your team) still do yourselves. Anything ticked is a task a trained admin could take off your plate. Count your ticks, then turn to page 3.

40 admin tasks you can hand over

Tick each task you still do yourself, after hours or between jobs.

Jobs & scheduling

- [ ] Logging new jobs and work orders
- [ ] Booking and dispatching technicians
- [ ] Confirming bookings with customers
- [ ] Rescheduling cancelled or delayed jobs
- [ ] Chasing job sheets and photos from site
- [ ] Closing out completed jobs
- [ ] Booking return visits and follow-ups
- [ ] Managing warranty and insurance jobs

Customers & enquiries

- [ ] Answering email enquiries
- [ ] Returning missed calls and messages
- [ ] Sending job status updates
- [ ] Booking changes and cancellations
- [ ] Requesting Google reviews
- [ ] Logging complaints for your review
- [ ] Updating customer records
- [ ] Following up after completed jobs

Parts & suppliers

- [ ] Finding part numbers from manuals
- [ ] Requesting supplier quotes
- [ ] Raising purchase orders
- [ ] Tracking deliveries and back orders
- [ ] Matching supplier bills to POs
- [ ] Lodging warranty part claims
- [ ] Updating stock and price lists
- [ ] Keeping supplier accounts up to date

Compliance, assets & contracts

- [ ] Maintaining asset registers
- [ ] Scheduling preventative maintenance
- [ ] Preparing compliance and service reports
- [ ] Tracking licences, tickets and insurance expiry
- [ ] Monitoring contract renewals
- [ ] Keeping site access and induction details
- [ ] Tracking SLA deadlines
- [ ] Filing certificates and job documents

Quotes, invoicing & cash flow

- [ ] Preparing quotes from site notes
- [ ] Following up open quotes
- [ ] Invoicing completed jobs the same week
- [ ] Batch invoicing maintenance contracts
- [ ] Preparing progress claims
- [ ] Chasing overdue invoices
- [ ] Sending payment reminders
- [ ] Preparing records for your bookkeeper

Hand over any task in 4 steps

1. **Record it once**
   Do the task as normal while recording your screen with a free tool like Loom. Talk through what you're doing and why.

2. **Write it down**
   Your admin turns the recording into a short written process with screenshots. You check it once.

3. **Watch it done**
   Your admin does the task while you (or their manager) review the first few, then fix anything that's off.

4. **Let it go**
   The task is off your list for good. If your admin is away, the written process means someone else can step in.

What is admin costing you?

Tasks ticked on page 2 _____

Hours a week you spend on admin _____ hrs

What your time is worth on the tools _____ $ /hr

Hours x rate x 48 weeks _____ $ /year

Example: 12 hours a week at $110 an hour is $63,360 a year of your time spent behind a desk. Try the calculator at mytasker360.com.

Ready to hand it over?

MyTasker360 gives Australian trade businesses a dedicated admin trained in the trades, working your hours in your job management system, with oversight from our Operations Manager. Official AroFlo and Simpro partner.

Book a free call

mytasker360.com
service@mytasker360.com