Choose what needs your attention

Administration keeps a business running. Giving it a planned place protects time for licensed work and for the people who need you.

Three kinds of work

- Income-producing activity: permission-based follow-up, scheduled needs conversations, presenting suitable options and helping with an eligible application. These activities can support revenue; they do not guarantee it.
- Client service and professional duties: coverage questions, time-sensitive problems and required compliance work. Protect this time even when it does not produce an immediate sale.
- Administration: organizing the calendar, tracking assigned work, organizing receipts and formatting approved materials. Batch repeatable work where practical.

A solo agent's weekly plan

- Block time for scheduled conversations and permitted follow-up before filling the calendar with admin.
- Choose a regular admin block and a short daily triage for urgent client issues.
- Keep a list of recurring tasks. After a week, mark each: keep, simplify, delegate or stop.
- Review completed conversations, follow-up commitments and service issues, not just how busy the week felt.

Try it with the planning worksheet

One result this week: _____

Protected work block: _____

Admin block / urgent-service exception: _____

One repeatable task to simplify: _____

Start a VA with a bounded task

A virtual assistant (VA) or administrator needs an owner, a script or procedure, permitted access and a clear stop point.

Possible tasks, with owner-approved access

- Maintain calendars, confirm logistics and send approved scheduling messages through permitted channels.
- Sort incoming requests, acknowledge receipt with approved wording and route questions to the assigned agent.
- Track due dates, missing administrative steps and completion evidence in the approved system.
- Format already approved posts, organize the resource library and check public links.
- Organize receipts and routine records for review without making tax or accounting judgments.

Keep licensed judgments with the agent

An unlicensed helper should not recommend plans, compare coverage, decide eligibility, interpret benefits or complete regulated sales work. Do not assume a calling, enrollment or data-entry task is permitted: confirm the exact task with your state licensing and agency/FMO compliance contacts first. For Medicare inquiries, use the approved permission, appointment and recording processes; a VA does not bypass them.

Write the handoff before assigning it

Task / trigger / due date: _____

Approved steps / completion evidence: _____

Stop and contact the agent when: _____

Check the first result

Use a blank practice example first. Give each helper their own account and only needed access. Keep client records in approved systems, not in group files or public AI tools. Review initial work and remove access when the role ends.

Coming from Bloom

Sprouts CRM is coming from Bloom. Details will be shared when ready; it has not launched. Start by documenting the process you want support with.