QUICK GUIDE TO DEVELOPING A DELEGATION STRATEGY

TAKE BACK YOUR DAY WITH SMART DELEGATION

TRUSTY OAK

WRITTEN BY EMILY FISK

TABLE OF CONTENTS

- Why Delegation Matters
- Why Strategize Your Delegation?
- How to Develop Your
 Own Delegation Strategy
- It's Time to Take Back Your Day

CHAPTER ONE:

WHY DELEGATION MATTERS

WHY DOES DELEGATION MATTER?

Delegation is the difference between success and burnout.

Congratulations! The fact you downloaded this ebook tells us something important about you: your business is growing, you're starting to taste the fruits of your labor, and you're at a crucial turning point. Small and medium-sized business owners start thinking seriously about delegation when their companies take off; you're no longer a one-person show operating out of your local coffee shop, and it's time to get serious about handing off tasks before you lose steam.

This is where the successful business owners break away from the pack; it's the juncture where smart entrepreneurs make a crucial decision that could determine their future.

Will you delegate or will you burn out?

Delegation is a smart leadership strategy and a way of life for seasoned business people. But at this moment in a company's lifecycle, it's more than that: it's an essential next step. Small businesses open their doors every year, but keeping the doors open—that's the real struggle.

Fifty percent of small

businesses close up shop within five years of their founding. Your survival depends on making a transition from handling every aspect of your company's operations yourself to bringing on the right talent, trusting your team, and delegating some of the workload.

DELEGATION MATTERS BECAUSE:

• The 80/20 rule:

We've all heard it before. 20% of your work equals 80% of your results. This is especially true for entrepreneurs who are spending valuable time on daily operations that are necessary but aren't benefitting your core business. You can do less and accomplish more with delegation.

Your work/life balance:

Sure, the early years of a startup may require 80-hour work weeks and a brutal schedule, but you deserve some balance. Inthe end, more time for family and your personal life will make you a better business owner.

You can't know everything:

We already know you're good at what you do—your talent and drive have gotten you this far. But unless you're Chuck Norris, you probably aren't an expert at everything. Delegating gives you the opportunity to use the expertise of others to grow your company.

"If you really want to grow as an entrepreneur, you've got to learn to delegate."

CHAPTER TWO:

WHY STRATEGIZE YOUR DELEGATION?

WHY STRATEGIZE YOUR DELEGATION?

Delegation takes planning, work, and practice.

You've decided to delegate, and now you're ready to dive in and hire someone. Hold up: don't jump in without a strategy. It may seem like a waste of time to strategize your delegation, but here's the thing: too many business owners take the big step to get tasks off their plates and then wonder why their workload stays the same. This happens for a few reasons.

You could be the bottleneck.

Let's say you hire someone and start giving them tasks, but you're reluctant to hand over the keys (perhaps physically and metaphorically). **It's hard to give up the steering wheel when you built the car from scratch.** But a workflow that doesn't empower your employee or assistant to take initiative and do their job won't take work off your plate. In fact, you'll end up wondering how you're suddenly busier micromanaging a new team member. This is where the ineffective delegator says, "Never mind, it's faster if I do it myself." (Hint: it's not.)

Delegate the right tasks.

Before you bring someone onto your team, it's vital to identify what you need to delegate. We'll get into how to do that later in this ebook, walking you through step-by-step how to determine your specific tasks to reassign. It's crucial to identify the jobs that you need an expert for, are low-priority administrative items, or are a waste of your time as a business owner or manager. Think about it this way: if you're a C-level manager at your company, what's your time worth per hour? What if you were paying that hourly wage or yearly salary for someone to perform administrative support or manage social media? You'd be overpaying. Delegating the right tasks means you're paying the right price.

Your employee needs the tools to succeed.

Whether it's training, a handbook, important login credentials, or simply your blessing, your chosen team member will need tools to do their job. Set yourself and your assistant up for a win by identifying and providing the means and authority they'll need to get the job done. If you don't recognize and plan for these tools, you'll end up paying someone to twiddle their thumbs.

"Deciding what not to do is as important as deciding what to do."

CHAPTER THREE:

HOW TO DEVELOP YOUR OWN DELEGATION STRATEGY

DEVELOPING YOUR DELEGATION STARTEGY

It's time to delegate.

Alright—it's time. Here's where the rubber meets the road and you begin the process of delegating. Use this step-by-step guide to develop your delegation strategy.

Identify your must-delegate tasks.

As we mentioned before, you can't just hand off any old to-do and enjoy the perks of smart delegation.

Every business executive has a different set of tasks that they'll benefit the most from delegating.

This first exercise will help you find yours. Start by asking yourself the questions on the following pages, and then use the list of example tasks at the end of this guide to get the ideas flowing.



"In the interest of overcoming my reluctance to delegate, starting Monday I want you to do all of my worrying for me."

MUST-DELEGATE TASKS

ASK YOURSELF THESE QUESTIONS:

Use the space below each question to jot down answers and notes.

How do I spend a typical day and week?

First, take a minute to list your typical daily and weekly tasks. From emails to phone calls to client management, write out what a day in your life looks like. You might need to include monthly or quarterly items as well, such as invoicing, accounting, or seasonal marketing campaigns.

What isn't generating results?

Here we go back to the 80/20 rule.

Look at that list of daily tasks again and identify what isn't adding value to your company, whether it's necessary-but-mundane busy work or you're just not able to devote the time required.

What do I lack expertise in?

Is there someone who could do certain tasks as well as or better than you? Do you find yourself dreading your weekly date with accounting spreadsheets because you hate numbers, or do you consistently forget to post to Twitter? If you're not the right person for the job, you shouldn't be spending your time on it.

4

What's stuck on my to-do list?

Do you have tasks that keep making an appearance on your to-do list but never get checked off? Maybe it's something you know you should be doing—like social media marketing or updating your invoicing workflow—but you simply don't have the time, and it's not crucial enough to delay other work. What are you procrastinating on that another person could help with?

EXAMPLE TASKS:

Admin Support

- Prepare and send invoices
- Expense reconciliation
- Research and request estimates from vendors
- Order promotional material or other products
- Organize folders and files on Google Drive or Dropbox
- Prepare estimates, proposals, and contracts
- Update contacts in your CRM/database
- Send gifts to employees, clients, or prospects
- Manage an email inbox and schedule appointments
- Receive or return phone calls (using a VOIP phone system)
- Book travel and plan itineraries
- Send cards or handwritten notes on your behalf
- Book speaking engagements

Lead Generation

- Connect you with ideal clients on LinkedIn
- Research prospects and gather data such as contact information
- Send scripted emails requesting appointments
- Cold-calling (following your script and FAQ sheet)
- Manage Facebook Ads
- Create a web landing page and contact form

Marketing Support

- Create and or post content for your social media channels or blog
- Write website copy
- Prepare and send email marketing campaigns
- Design new channel art for social media or create branded graphics to share
- Create brochures, handouts, or PowerPoint presentations
- Update your website content
- Edit video or audio content and upload to your site, Youtube, or iTunes

Hiring Support

- Write a job description/job listing and publish it to Craigslist, Monster, Indeed, or other job boards
- Review resumes
- Conduct phone-screening interviews (using your questions)
- Schedule in-person interviews for you and top candidates

Get the wheel turning and offload the right tasks.

FIND YOUR PERFECT TEAM MEMBER

Now that you have your list of tasks to offload, you're in an ideal position to find the person for the job.

That list of tasks you just created is about to come in awfully handy. The best way to identify your perfect-fit team member is by starting with a job description: and hey, you just wrote one!

List out the responsibilities you'd like to delegate and use that to craft a bare-bones job description. All you need to know at this point is:

What expertise and background would someone need to handle these tasks effectively?
What would the ideal candidate offer in education, certifications, and qualifications?
Do you need more than one person or could someone handle everything?

You've got the job description and your ideal candidate in mind. It's time to begin your search.
Where do you find this rock star?

"Hire people who are better than you are, then leave them to get on with it."

LOOKING FOR AN ASSISTANT

- Post on reputable job sites: Glassdoor, Indeed, and Monster are all great places to post your job description. If you want someone in-house as an employee, posting the job online can get you started.
- Outsource through a virtual assistant company:
 The power of the internet has made it economical and easy to hire help. A remote, independent worker might be just the ticket for your needs, giving you the opportunity to use an expert on an as-needed basis and without the costs and headache of hiring in-house.
- **Network:** Ask friends and colleagues for a recommendation, and use LinkedIn to explore your existing networks for the right candidate. A referral could get you on track.

Now comes the hard part: truly delegating. Your delegation hasn't even fully begun until you let go and let Joe (or whoever you hire) take over these tasks. It's time to build some trust.



DEVELOPING ACCOUNTABILITY WITH YOUR EMPLOYEES

With your leadership and a willingness to adapt, you'll be a delegation pro in no time.

- 1. Start small: You don't have to hand over the keys to the kingdom today. Give your new assistant some less important tasks to start with. Get a feel for their process and their personality by working on a project with them. There's always a breaking-in period with any new team member, and your attitude will set the tone for their relationship going forward. Be vocal with your feedback, both praise and corrective.
- 2. Develop and adapt a workflow: Resist the urge to micromanage! The best way to give yourself peace of mind while truly giving your assistant freedom to do their job well is to utilize a smart workflow. Collaboratively create processes for tasks with your assistant that include timely check-ins and approval benchmarks. Make the approval process straightforward: don't be a bottleneck or create more work for yourself.
- 3. Let it go: The hardest and most crucial step is letting go. Over time, the right employee or assistant will learn what you prefer and how to meet your requirements. As this happens, let go of the reins and enjoy your newfound freedom.

FINAL THOUGHTS

Keep the goal in mind.

Too many entrepreneurs think they're too busy to delegate: after all, delegating takes work, planning, and clearly, a fair bit of strategizing. But the truth is, you don't have time not to delegate.

When you start feeling discouraged or bogged down in the process of delegating to your team members, remember your ultimate goal.

You're delegating because:

Your time is too valuable to spend on certain tasks.
You deserve work-life balance.
Your business will be better for it.

Delegation does take work, but it provides you with long term freedom and adds quality to your business through the expertise of your team members.

So, are you ready to take back your day?

"If you want to do a few small things right, do them yourself. If you want to do great things and make a big impact, learn to delegate."

IT'S TIME TO TAKE BACK YOUR DAY

Your typical day is about to look a whole lot different with some expert help. Schedule your free consultation today!

TALK TO CLIENT SUCCESS

TRUSTY OAK