



# HOW TO FREE UP 8+ HOURS A WEEK

The Ultimate Guide to

*delegation*



## INTRODUCTION

Hello!

If you're reading this, it's probably because you've struggled with delegation or you are overwhelmed and need to free up time in your workweek. Maybe you're having a hard time loosening the reins. Maybe you've delegated in the past and the results were disappointing. Maybe you're not even sure which tasks you could be delegating!

Wherever you are in your delegation journey, know that:

- a) you're not alone
- b) I can help!

My name is Susan Drumm, and I'm really glad you found me. Admitting that things could be better with how and what you delegate is the first step toward more effective teamwork and (more importantly) more time and space to do the things that only you can do.

I've helped top-name CEOs and Fortune 100 companies tighten and heighten their teams. I've shown hundreds of clients how to lead in a better way and delegate more effectively.

This guide will walk you through delegation simple, fast, and painless. We'll talk about creating the right mindset, understanding what you should delegate, who you should delegate to, and how to get the results you want.

Delegation is an art, not a science, but with my help, I know you can create a masterpiece.

Here's to more free time and less stress,

*Susan*

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# 1. CREATE THE RIGHT MINDSET TO START DELEGATING

Like anything, the first step to delegating is creating the right mindset. Many of us — from mid-level managers all the way up to 9- and 10-figure CEOs — struggle with this!

**Instead of** “I’m the only person who can do this,”  
**shift to** “I have faith that the right person could do this.”

**then answer:**

- What part of what I currently spend my time on is not my true genius zone?
- Who else has this as *their* genius zone?

**Instead of** “It’s faster if I do it myself,”  
**shift to** “I know I can teach someone to do this.”

**then answer:**

- What's tactical that I do repetitively?
- How might I use a screencasting service to create tutorials\* for future onboarding?

**Instead of** “If I find the right delegate, they’ll never, ever make a mistake,”

**shift to** “We’re all human. I make mistakes, and my delegates will too.”

**then answer:**

- How am I providing feedback?
- Is it clear how to avoid a repeat of the mistake?

\*More on these tools to come!

**Instead of** “My delegate has to do this exactly the same way I do it and exactly as well,”

**shift to** “Different isn’t wrong, and done is better than perfect.”

**then answer:**

- Is what I'm doing the highest and best use of my time?
- Who else can get this to the finish line?

**Instead of** “I don’t know if I should delegate this task,”

**shift to** “If my delegate can do this 70% as well as I can, I’ll delegate it.”

How do you know when to delegate? This fantastic article from Inc.com tells us:

Put simply, if the person the CEO would like to perform the task is able to do it at least 70 percent as well as he can, he should delegate it. Is it frustrating that the task won’t be done with the same degree of perfection or perceived perfection that the CEO himself could achieve? Sure! But let go of perfection. Is it easier said than done? Yes, certainly. But there is no place for perfection when it comes to delegation. The upside for the CEO is that he doesn’t need to spend any time on the task — zero. The “return on time” he doesn’t spend on that task is infinite, in addition to gaining that same time to invest in a higher impact project.

**Ready to step through how to answer these questions? Read on!**

## Key Takeaways

- “I have faith that the right person could do this.”
- “I know I can teach someone to do this.”
- “We’re all human. I make mistakes, and my delegates will too.”
- “Different isn’t wrong, and done is better than perfect.”
- “If my delegate can do this 70% as well as I can, I’ll delegate it.”

## 2. FIGURE OUT WHERE YOUR TIME GOES + WHAT YOU CAN DELEGATE

Before you can delegate your work, you need an in-depth understanding of how you really spend your workday. You manage what you measure, and you'd be amazed at the tasks that are time sucks.

For the next two weeks, use a time tracker to document how you spend every minute of your workday.

If you already track how you spend your time, then just skip straight to **STEP 3** with your data to work with for the next exercise.

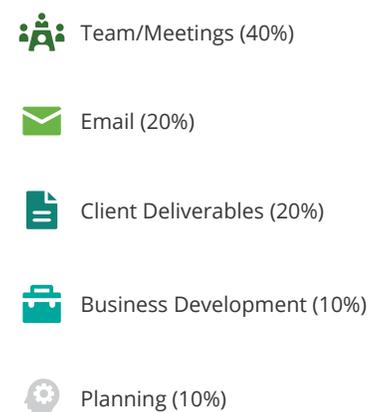
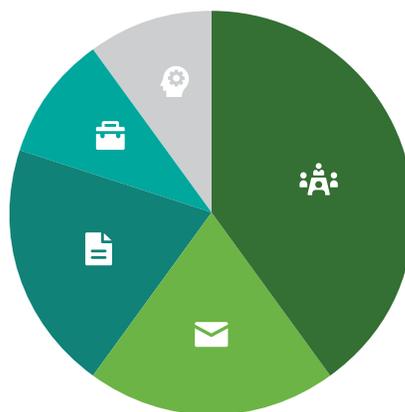
**STEP 1:** Break your daily tasks into several categories — client deliverables, email, internal team meetings, planning, coaching direct reports, issues resolution, etc.

**STEP 2:** Track what you're doing and how long it takes under those headings in an app like Toggl. [Toggl](#) is free, installs in your toolbar, and makes it incredibly easy to track time.

**STEP 3:** After two weeks, write out a list in the space below of 25–30 different items that represent how you spent your time. Examples might be: *responding to client emails, scheduling meetings, travel, conference calls, creating PowerPoint presentations, reviewing forecasts, budget planning, issues troubleshooting, etc.* You get the idea!

### WHAT I LEARNED USING TOGGL

It's easy to analyze your days and improve your productivity. Mark your time entries as **billable** and use **tags** to add any additional information to them. Once you've tracked some time, look at the **footer** at the bottom of the page to get an overview of which projects have taken up your time the most.



All the work I actually did in the last two weeks:

Now, as you're filling this out, I imagine that you're realizing that maybe you don't need to do all of this yourself?

Yeah, I thought so.

So now let's take everything you've listed in the table above and divide it under three different headings:

*Things Only I Can Do, Things I Need to Guide, Things I Shouldn't Be Doing*

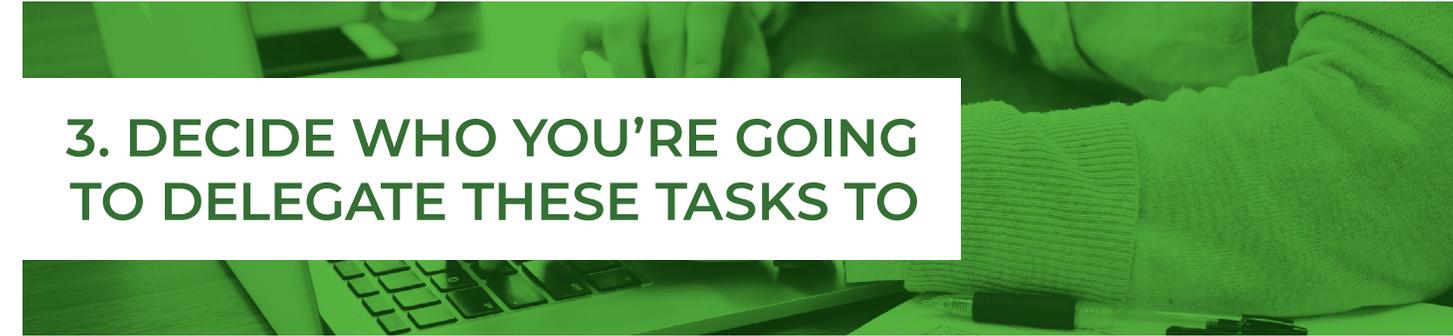
Put each of the items you listed above into one of the following three categories, **based on a potential future state you want to achieve (say, in 6 months' time)**. In Column C, add an asterisk (\*) next to things that **no one** should be doing.

<b>Column A</b> <i>Things only I can do</i>	<b>Column B</b> <i>Things I need to guide...</i>	<b>Column C</b> <i>Things I shouldn't be doing...</i>
<i>Meet with direct reports one-on-one</i>	<i>Requesting vendor quotes</i>	<i>Scheduling travel or meetings</i>

Once you do a first pass, really push yourself to see if you can transfer even more tasks out of the *Things Only I Can Do* column!

## Key Takeaways

- 1) Track what you're doing and how long it takes.
- 2) Categorize what only you can do, can guide, or shouldn't do within 6 months as a vision of how you will be spending you time in the future.
- 3) Transfer more off your "must do" list! Challenge yourself to push things you think only you can do to Column B (opportunities to delegate).



### 3. DECIDE WHO YOU'RE GOING TO DELEGATE THESE TASKS TO

Do you currently have a team member that you can potentially delegate to, but your aren't sure they have capability or capacity to take on new work? Then skip the section below and jump right to 1.

If the answer is no, then let's help you find some outsourcing resources until you are at a place in which you can hire a full-time employee.

First, do you have a powerhouse VA (virtual assistant)? This is a non-negotiable resource you need to hire to free up 8+ hours. Two great companies that can help you find the right VA for you are [OutsourceAccess.com](https://www.outsourceaccess.com) and [GetLeverage.com](https://www.getleverage.com).

A VA can handle many more tasks than people realize. Check out this list from [OutsourceAccess](https://www.outsourceaccess.com) for the top 200 tools you can outsource to a Virtual Assistant to fuel your business growth. You won't believe how much you can get done when you let go of thinking you need to do it alone. From content and email marketing, to bookkeeping and invoicing, to basic project management—a high-end VA can tackle many of the those things you moved from Column A to Columns B and C in the last exercise.

#### 1. Consider available delegate skill **capability**.

*Does your delegate have the skills to do the work?*

*If not, do you trust that they can learn?*

This doesn't mean they have to learn from you — you can delegate the training as well. For instance, I recently had one of my senior, more experienced staff members train a new employee on how to master the art of creating top-notch PowerPoint presentations.

Yes, training takes time, but you get a huge long-term payoff for short-term time investment. If you find that there is a task that you do not trust any of your delegates with, then outline the skills necessary and determine what additional resources you actually need.

#### 2. Consider available delegate **capacity**.

*How can I delegate if my team has no capacity?*

Many clients ask this! Your job as a leader is to help your team create the capacity by helping them prioritize work (otherwise they may automatically do tasks in the order received or by whichever task they like the best).

Help them go through the same process you just went through using the three column chart (Things Only I Can Do). If you've coached them to maximize their efficiency (and rarely do I see leaders that have maximized the efficiency of their staff), then it's time to bring on additional headcount if you still need more capacity — or **choose to drop or postpone less important initiatives**. If everything is a priority, then nothing is a priority.

### 3. Consider available **cross-functional** resources.

Once you know where you need help, it's time to think about where you can find that help.

This advice might sound obvious, but many managers struggle to determine when they should delegate and which team member is right for the task. If your immediate direct reports are tapped out, what about reaching out to other areas of the organization who may be better suited to help?

*Can Finance compile last quarter's subcontractor invoices in a spreadsheet or report so I can more quickly review job costing?*

*Do I need someone from Marketing to edit or layout my product decks or draft a PR response to a client announcement?*

*Will one of the Senior Developers be able to summarize this week's sprint fixes in an email to the end user group and tech support?*

To help you determine **who** to delegate to and **when**, it doesn't hurt to cultivate relationships amongst other managers to keep a finger on the pulse of which of their up-and-coming staff may want to take on your overflow. It's a great opportunity for them to get exposure in initiatives outside of their current sphere of influence as part of their professional development.

Given the chance to broaden their skill set, I've seen many managers fix their capacity issues using this approach.

You never know who might raise their qualified hand to volunteer with availability for that next project!

## Key Takeaways

- 1) Hiring a VA is critical to freeing up 8+ hours. They can do more than you think!
- 2) Screencasting software enables you to create easy tutorials that help improve delegate capabilities.
- 3) Free up your delegate's capacity to take on more by having them go through the same exercise on analyzing their time that you just completed.
- 4) Cultivate relationships with rising stars who may be willing and ready to take on your overflow.



## 4. PROVIDE GUIDANCE + STRUCTURE

Even the best team member can't read minds! When we've been doing the same type of work for years, we underestimate how hard it can be or how many steps are involved. You're more likely to get the results you want if you give your delegate the guidance and structure they need to do their best work.

### 1. Specify agreed-upon levels of initiative and authority

Develop your delegate's problem-solving skills and initiative by clarifying a framework for the direction they should take if they get stuck on their task. One of the best-selling Harvard Business Review articles of all time from the 1970s [\*"Management Time: Who's Got the Monkey?"\*](#) artfully described how this initiative typically gets transferred in "The Anatomy of Managerial Initiative." In a nutshell, authors Oncken and Wass broke down five common levels:

- 1) They wait until told what to do (lowest initiative).
- 2) They ask you what to do.
- 3) They recommend an action. Once you give your approval, they can implement it.
- 4) They take action on their own but advise you immediately.
- 5) They take action on their own and update you through routine procedure (highest initiative).

Operating at levels 1 and 2 doesn't really provide much relief to you, resulting in the "I could have done this faster myself" regret — bringing you back to where you started.

Rather than spelling out exactly what to do, I am a big believer in promoting (at a minimum) an environment where delegates come to me with a proposed level 3 solution (or two or three solutions) because they are working the problem and are closer to it.

For instance, I recently assigned an employee the task of doing a product conversion. After she started working on the project, there were several things that she noticed were not going to be applicable to the new product. Instead of emailing me asking what she should do to toss the obstacle back over the fence and expecting me to fix the problem, she emailed me a list of suggested options.

Levels 4 and 5 ultimately save you the most time. You need to build trust with your delegate and empower them to act independently with less guidance. Provide the guiderails, and let them execute without your hand-holding!

## 2. Assemble tutorials for the more complex duties

Your delegate might be very experienced and yet need to resort to level 2 with complex tasks that are specific to you and your work. How do you run those analytics reports? How do you access the internal site of brand assets? In some cases, figuring out these tasks is exactly what you pay them for, but you still may want to provide some guidance (e.g. guiderails!).

### Use screencasting software to make tutorials fast + easy

Explaining complex computer tasks in plain English is shockingly hard and nobody wants to read a binder full of sentences like “in the upper right-hand corner, click the icon with three lines.” Or, if you are like me, you travel frequently and can’t always be in the same time zone to walk your team through the nitty-gritty of an assignment. Luckily for all of us, screencasting software is readily available and frequently free!

What’s screencasting? It’s software that records what you see on your screen while simultaneously recording your voice. You can create videos that walk the viewer through all the steps to making on-brand marketing images, analyzing reports, or storyboarding a presentation! [Loom](#), [Open Broadcaster Software](#), [Screencast-O-matic](#), and [Screencast](#) are all free.

In fact, [here’s a screencasting video](#) on how to use screencasting software!

## 3. Use a project management platform

Even the best, most organized delegate can miss details when they’re hidden in a string of emails that dates back three weeks.

Our team loves [Asana](#) so that we don’t get stuck managing everything via email. I can check on progress and search all folders and messages when I want to find something related to a project I am working on.

[Basecamp](#) is another beloved project management platform, or your organization may have other approved platforms implemented that allow you to assign projects and deadlines, upload documents and images, comment on projects, create checklists, and track progress. They make it nearly impossible to drop the ball or screw up!

### Key Takeaways

- 1) Specify agreed-upon levels of initiative and authority.
- 2) Use screencasting software to create easy tutorials that your delegate can refer back to while completing the work.
- 3) Use a project management platform to help with communication and handoffs.



## 5. ONBOARD YOUR TEAM CORRECTLY

Now that you've adjusted your mindset around delegating, know what you're going to delegate, and you've found the right person to delegate to, what steps do you need to take when a new team member starts working for you?

If you want to avoid disappointment, you need to set up an onboarding system. Now, that might sound intimidating, but it's really just a fancy way of saying "orientation" or "on-the-job training."

Here are the three steps I take with every new employee.

### 1. Within a week of hiring, have a meeting to talk about each of your working styles

What if you sat down with each new hire and talked through both of your preferences and pet peeves, strengths and weaknesses before you handed over a pile of work? What if you were honest about your working style and the fact that you'd prefer one long email to fifteen short ones? You'd sidestep so many future issues and annoyances!

### 2. Share your vision for this position

Are you hoping that this person will be a self-starter you hear from twice a month? Or would you like a hands-on, always-in-communication hire? They won't know unless you tell them!

### 3. Create a two-way street of communication

Be sure to take their needs into account! Ask them about their communication preferences or things that drove them crazy about previous clients. Do they like to email five times a day? Do they want to call you if they're confused? It's always better to know up front so if your communication differs, you're both aware of it.

## Key Takeaways

- 1) Within a week of hiring, have a meeting to talk about each of your working styles.
- 2) Share your vision for this position.
- 3) Create a two-way street of communication—ask about their communication preferences.

## 6. DELEGATE WITH DIPLOMACY

Okay! Now it's time to really dig in. We've figured out which tasks we're delegating, we've hired the right person, given them structure and support, and onboarded them correctly. It's time to delegate your first task. Where do we start?

I like to remember the acronym OURS when I'm delegating. (As in: this project/assignment is "ours," together. You see what I did there?)



### 1. (Vivid) Outcomes

We often focus on the process we want someone to follow instead of creating a clear picture of the outcome we want to see. Your efforts are better spent describing, in vivid detail, what you want the finished product to look like.

*What would a "homerun" look like? Share THAT!*

### 2. Usage

Provide context for how you will use the information or project that you're delegating.

*Why do you need this done? How will you use it? Why is it important?*

It seems obvious, but I can't tell you how many times this step is forgotten.

It makes a huge difference when your staff knows how their work will be used. When they know how it will be used they can shape the outcome and set you up for a much better finished product.

### 3. Relate to Prior Tasks

Compare the assignment to previous work. Our best teacher is history.

*How is what you are asking like or not like another project in the past?*

*What is different here? What is the same?*

*How might the person borrow from prior projects they've done for you?*

## 4. Seal the Deal

Share important facts regarding prioritization and timing.

*When do you need this by? Why?*

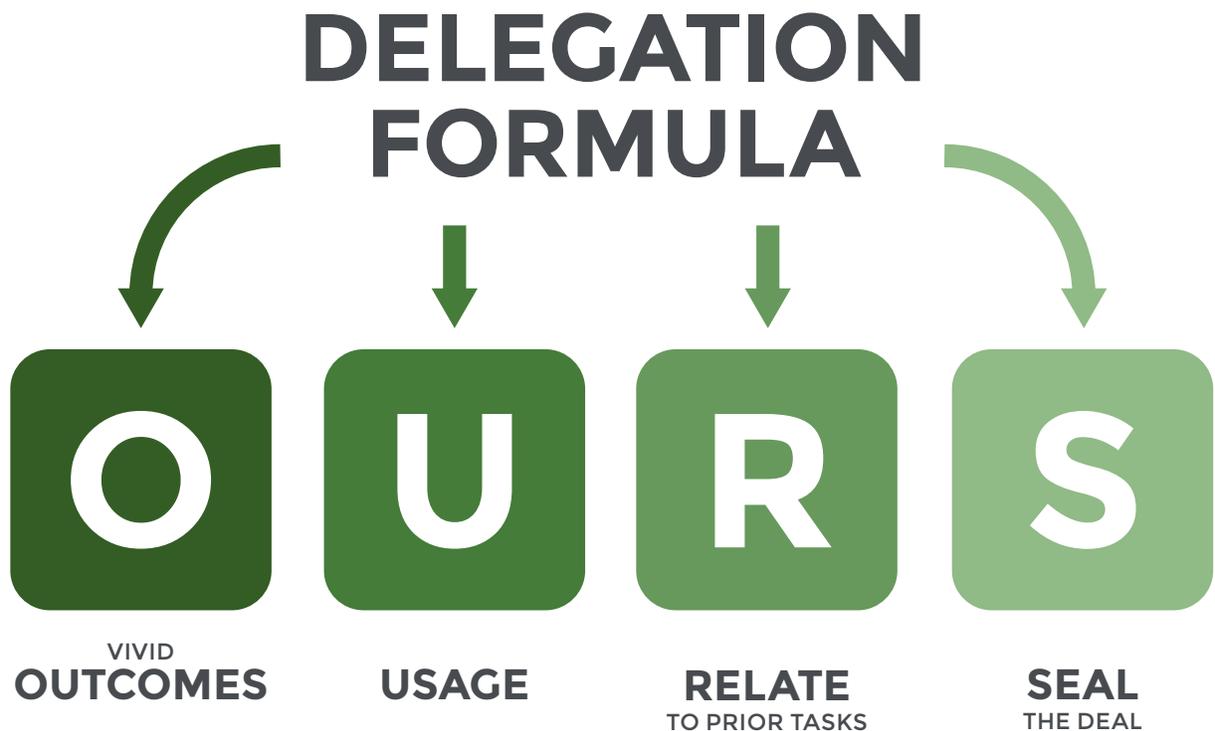
Here's the catch — don't just give a deadline. Ask:

*Is this doable in that time frame? If not, can I help you prioritize?*

Help them figure out how to order assignments. Don't stop there; *ask them to summarize what they understand the assignment to be.* You may find gaps in your communication or gaps in their understanding.

Whatever happens, do not leave the conversation without an agreement (a verbal "yes") on a due date. This is critical if things go awry and you need to course correct.

### Key Takeaways





## 7. COURSE CORRECT WHEN THINGS GO WRONG

When delegated work doesn't turn out, we nearly always blame our delegate. Are they incompetent? Lazy? These thoughts are understandable but they're not productive. Blame only creates defensiveness and frustration — for both of you.

Make a conscious decision to replace judgment with curiosity. Choose to be curious about what happened.

*Did you actually make a clear agreement?*

*Did the delegate have other priorities that got in the way of completing the task?*

*Were these just plain old mistakes?*

### Did you make a clear agreement?

Ask your delegate what they understood the assignment to be; ask them before you restate your request. Look for gaps in understanding.

When we're delegating, we think we're spelling out the task in black and white, but studies show we only communicate 50–80% of what's in our mind. The other 20–50% goes unspoken! Our brain tells us we gave a full description, but we rarely say everything we're thinking. This is why you'll save yourself (and your staff) a lot of work if you ask them to restate an assignment before they dig in.

Before you delegate your next project, find one thing you could have done to better communicate the assignment. Ask your delegate to identify one question they could have asked to better understand the project. Ask them to incorporate this into future conversations.

### Were there prioritization challenges?

You had a clear agreement, but other work “got in the way.” It's important to identify these issues early in the process, not 20 minutes before it's due.

Let your delegate know the impact of not having the assignment done on time and ask when they first had a sense the work might not be completed.

*Could they have come to you earlier?*

In most cases, your delegate didn't realize how much time the project required and didn't speak up for fear of appearing incompetent. Nip this in the bud by insisting they come to you earlier if projects are running late. In the future, when they let you know ahead of time, reward this behavior by helping them prioritize what matters most.

## Were these just mistakes?

We all make mistakes. But at some point in your working relationship, you'll have to consider the frequency of these mistakes and if they're affecting business. If they don't happen often and they're not affecting your bottom line: let it go. You make mistakes too!

If they're making mistakes too often, discuss how your delegate can improve their performance or consider if they're in the right job.

### Key Takeaways

- Did you make a clear agreement?
- Were there prioritization challenges?
- Were these just mistakes?

## What's next?

Now that was a big “data dump” on how to delegate, Yes?!? Simply put, there is nothing more important than you improving your skill set in this area.

**Your career growth and business success depend on your ability to free up capacity so you can take on new projects, while building the skill sets of those on your team to support you.**

I know there are things you can start implementing immediately based on what you read in this guide.

**And there are some things you'd like further guidance on, including sticky situations that comprehensive program can help you fix.**

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Good news! We offer exactly what you need:

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*Susan*