

DELEGATE TO ELEVATE

ACCOMPLISH MORE

 BY JUGGLING LESS

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INTRODUCTION

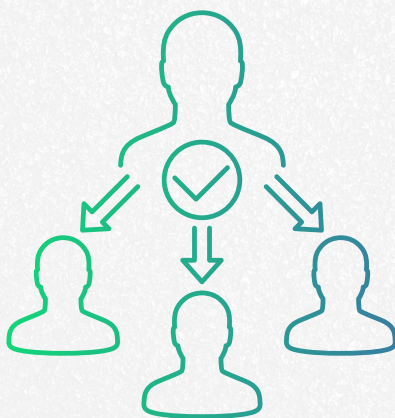
POP QUIZ:

Have you ever caught yourself saying ...

- ⇒ *"No one can do this the way I can, so I'll do it myself."*
- ⇒ *"If I can do it myself, I probably should."*
- ⇒ *"This is too mundane a task to delegate."*
- ⇒ *"I could complete this task in the time it would take me to explain and delegate."*

If you answered 'yes' to any of the above, then chances are you could benefit from learning a thing or two about effective delegation.

But listen. Delegation is hard. We've been there. We've done—and not done—that. And let us tell you: For all our kicking and screaming, *'I can do it myself!'* we have now fully become the choir that preaches that delegation is the cost of our sanity and the lynchpin to the survival of businesses everywhere.



In today's push-button-get-banana world, we constantly seek to address every alarmingly red ticker notification and accompanying PING!

Is it an email? An invoice reminder? A Facebook message? A calendar invite?

If you respond immediately, you'll be instantaneously satisfied and get a rush of dopamine. Our response teeters precariously on Pavlovian; it's almost hypnotic.

But what if you just wait to respond, taking time to instead focus on impact and strategy? So you table the task, promising to return when you have time to respond more thoughtfully.

Wait. What was I just doing?

And therein lies the rub: Regardless of whether you respond now or later, that task has already set up shop—rent-free—in your psyche and has disrupted your brain waves. PING: 1 YOU: 0

OOF. We don't like those odds.

So what can you do? Or, better yet, ask yourself what can you not do?

FOR THAT ANSWER, YOU'VE COME TO THE RIGHT BOOK.

YOU SAY YOU'RE FINE—BUT ARE YOU?

On every flight, flight attendants are quick to remind us to 'secure your mask first, and then assist others.'

Why? Because it's kind of hard to help someone else if you're rendered unconscious from cabin decompression, right? The best intentions don't always yield the best results.

And, as we've all surmised by now, that simple, repetitive airline instruction serves as a much larger metaphor for life.

But we'll be the first to admit that we roll our eyes a little every time we hear that recitation. Because when you really think about yourself in a life-or-death situation, can you really imagine tending to yourself before your *insert kids, spouse, loved one or even seat neighbor*?

Again—why?

To put an even finer point on that phenomenon, it's **been found** that, on average, we say "I'm fine" 14 times a week—but only 19 percent of us actually mean it.

You know the experience: You're walking down the office hall and someone casually says, "Hey, how are you today?" Our instinctual response? "Fine, thanks. How are you?"

Wash, rinse and repeat.

For context, consider that while speaking with Oprah—yes, the Oprah—renowned professor and Licensed Master Social Worker Dr. Brene Brown polled the audience.

To the question of how many in the audience were comfortable asking for help, only a few hands raised.

She polled again.

To the questions of how many prefer giving help, nearly all hands raised.



“When you cannot ask for help without self-judgment, you are never really offering help without judgment.”

Dr. Brown stunned the room with what she shared next.

For many years, Brown admitted that her self-worth came from helping



“When you extract worthiness for helping people, that’s judgment, Brown said. When you don’t extract worthiness and you think, ‘I’m just helping you because one day I’m gonna need help’ — that’s connection. That’s vulnerability.”

other people. She was a social worker, after all—but also admitted that she would never ask for help.

So while you can do it all, you shouldn’t. You need help. You deserve help—and it’s out there, enough to help shoulder the weight of those crushing middle-of-the-night to-do lists.

Grocery services. Meal-preparation services. Housekeepers. Babysitters and nannies. Assistants. Friends. Loved ones. Bookkeepers. Neighbors. One-click, same-day delivery online shopping.

Help is everywhere. We just have to give ourselves permission to accept it, knowing we deserve it.

And so do you.

ADMITTING YOU HAVE A PROBLEM

You're an entrepreneur. You're the big idea person. The boots-on-the-ground person. The everything-in-between person. And, at least for a while, you relegate yourself to be the wearer-of-all-hats and juggler-of-all-balls, too, because, well, who else can?

And that approach works. But long term, you know deep down it isn't sustainable—not if you want to accelerate your business' growth, anyway. Because while your business may be bursting at the seams ready to grow, you can't possibly do more than you already do, try as you might to convince yourself otherwise.

There's no sugar-coating it: You're drowning in work.

Endless to-do lists, mountains of paperwork, calls and emails to return, bookkeeping and more—but instead of delegating some of those tasks, you choose to take them all on yourself. Why? Maybe because you're uncomfortable asking for help. Maybe you're uncomfortable giving up control. Maybe you tell yourself it's just quicker and easier to do it yourself than to take time to teach someone else how to do it.

You just can't help yourself, can you?

WE GET IT.

But you're a root-bound plant who knows it's time for a pot upgrade so you can experience limitless growth.

Think about it.

- ⇒ *Maybe you answered emails during your daughter's soccer game.*
- ⇒ *Maybe you told your loved ones you couldn't take a vacation this year.*
- ⇒ *Maybe you spend more time and energy reacting throughout your day instead of being proactive.*
- ⇒ *Maybe you pulled an all-nighter to make sure your payroll is processed, choosing work over sleep. Again.*
- ⇒ *Maybe you went out to celebrate your anniversary, but you were so distracted by intrusive thoughts about work that you can't remember what you ate.*

**IT WAS ALL TOO FAMILIAR FOR OUR CLIENT,
MEL LIM, TOO.**

“

I was working a 100 to 120-hour workweek, and at the same time, managing the children—and it was the holidays.

And I knew at that time that I really needed help. It was really, truly time. I was working until 2 or 4 in the morning, and then I had to get up at 6 a.m. to get the kids ready.

We were celebrating Christmas at my sister's for a week—and she was really nagging. She said, 'You're here, but you're not really here. You're working nonstop.'

In the beginning, I was reluctant [to delegate] because I'm so used to doing it all on my own.

So I gave little bits because trust has to be earned over time.

[And] you don't really see it until you start realizing that it all adds up. At the end of the 45 hours a month, you start to realize that, 'Wow. In the past, I spent all that time doing stuff that I should have been delegating.'



M E L L I M
FOUNDER AND CEO OF MASPIRA GROUPE

Let's get *uncomfortably* honest here: How long has it been since you were *fully* present? How long has it been since you've been able to fully disconnect from work?

We'll assumptively answer for you: Probably *too* long. You know how we know? Because *we've been there*. In fact, we'd argue most—and that's a *conservative* assertion—leaders have done the same.

Because if we're all being really real, we've all been there. Life has a sneaky way of getting in the way of our best intentions: being present, establishing healthy boundaries, and putting family first.

We *know* what we're *supposed* to do, but often, we just can't quite figure out *how* to do it.

This is when delegation proves critical.

But as with any struggle or obstacle in life, the first step is admitting you have a problem: You *may* not (read: *don't*) have everything under control.



WHAT IS DELEGATION?

First, let's make sure we're abundantly clear on what delegation isn't.

Delegation *is* a means of managing projects and tasks at their inception. Delegation is *not*, however, a last-minute dump of responsibility onto someone else's plate because you didn't plan or prepare appropriately. It's more of a relay than a game of Hot Potato.

Delegation isn't simply a way of unloading your responsibilities; it's how business owners and leaders can benefit from the powerful, multiplying effects of entrusting others to do that for which they were hired.

It's not about side-stepping tasks you hate, getting rid of mundane tasks, or unloading your weaknesses; it's a product of effective leadership.

For the *official* definition of delegation from the preeminent experts on all things vocabulary, we turn to Merriam-Webster.

DELEGATION *NOUN*

del·e·ga·tion | \,de-li-'gā-shən \

DEFINITION OF DELEGATION

The act of empowering to act for another

// the delegation of responsibilities

As you delegate, you not only free yourself from a busyness mountain of your own creation, but you also, in turn, develop the kind of employees and leaders who allow you, them and your business to grow.

See also: Merriam-Webster's reference to 'empowering.'

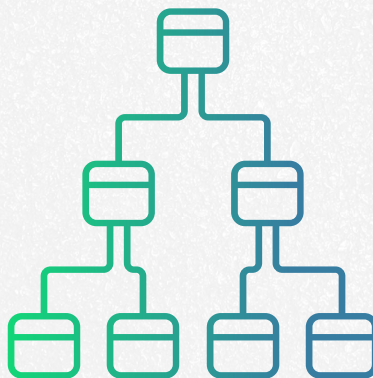
Put simply, delegation is a critical leadership skill. [According to a professor of organizational behavior at Stanford:](#)



“Your most important task as a leader is to teach people how to think and ask the right questions so that the world doesn’t go to hell if you take a day off.”

[Delegation benefits](#) nearly everyone—yet it remains one of the most underutilized and underdeveloped management capabilities. In fact, a [2007 study on time management](#) found that nearly half of the 332 companies surveyed were concerned about their employees’ delegation skills—but only 28 percent of those companies offered any training on delegation, the importance of delegation or even reasons to delegate.

But whether you realize it or not, delegation serves to develop employees and to identify future leaders. Further, it sends a powerful message to your employees that they are trusted, competent and valued.



WHY DOES DELEGATION MATTER?

Do you have the knowledge, skill, energy, and time to handle all those tasks? How about handling them effectively? How about handling them effectively and having enough free time and resources left over to focus on growth?

Let me spare you the need for thinking too much. The answer is no.

So we're just going to say it: **Most leaders suck at delegating.**

We hoard everything because we think we can do it better or faster. Why? Because it makes us feel good and accomplished and important.

We hoard out of fear.

But we have to let this stuff go.

66

My brother would say, 'You can't be a CEO and not read all your emails.'

[But] I couldn't keep my head above water. I just had way too much going on, but thought I should be able to keep my head above water—and other entrepreneurs don't have assistance. We can't afford that. So [that] didn't feel quite right.

[Still] I thought, 'I'll try it.' I remember the number-one piece of advice was [about] the importance of trust. If I don't fully trust, then [my assistant] can't do all the things I really need her to do.

And so I just needed to completely say, 'Here are my logins. Take over finances, calendar, you know—everything. So the trust really, really mattered.



COURTNEY KINGSTON
FOUNDER AND CEO OF KINGSTON FAMILY VINEYARDS

Get out of our own way. You cannot grow your leadership or organization if you are in the administrative weeds.

Just stop it right now.

Delegation—*effective* delegation specifically—is mission-critical. And as more organizations move toward a remote workforce, leaders must be adept at delegating. But delegating isn't easy—it takes practice and commitment, and can be the difference between accelerated growth and stalling out.

That said, you can't just expect someone to walk in on the first day and know how to manage your inbox or know what you need on your calendar.

It takes an investment of time—a lot of time.

And before you counter, *'I don't have time to delegate right now,'* hear us out.

Because—if we can be so bold—you likely can't afford to not make that initial investment.

But look. We hear you. And like we've said, we've been there. The first time you delegate, you think, *'It would just be quicker for me to do this task myself.'*

Resist this urge.

It calls for you. It beckons you like a siren. You start negotiating with yourself that it's *'just this one thing.'*

You can do just one thing yourself, right?

Wrong.

So again: Resist this urge. Resigning to do it yourself is a huge mistake. You've come this far—now commit to the process and see just how far you can go.

Now, back to that one thing.

Investing the time today to teach someone how to handle that task will take more time, but the long-term result is that tomorrow, you no longer have to do that one thing.

And just imagine how much time you would save yourself if you were able to do that with 10 things!

The wheel of limitless possibilities is turning now, isn't it? Good.



DELEGATION IN ACTION:

TRICIA SCIORTINO

LEARNING TO LET GO

I was there.

The one doing all the work to prove my value and worth.

To climb I must do it all. Know all. Be all. That's what I told myself. I honestly can't believe I bought into that, but admittedly, I did.

I ran up against that wall time and time again in my life. I couldn't have been more wrong. It made me feel a certain way—there was a twisted gratification in being what I perceived as independent—but it was not growing my capacity to lead.

I was stifling myself and those around me. And worse, I was an exhausted workaholic and burnt out.

But why? Why do we so often fall victim to this warped perception of leadership?

I hope you're sitting down because I'm not going to mince words. Shocker, I know.

We hoard the work to feel important and needed.

Roll your eyes, scoff, and *'Not me!'* this all you want.

This hoarding will slowly kill you with burnout. Look. I know 'hoard' is a harsh word. So is referencing your demise.

But sometimes, the truth hurts.

Hoarding feels strong. It feels gritty and scrappy and can often—if you squint hard enough—look like hard, productive work.

You know what else looks like it's working really hard? Spinning tires. So much motion, so little progress.

'Doing it all' is a myth. Snake oil. And we bought into it—hook, line and sinker

But that is not leadership. True leadership is trust and empowering others who work for you to *truly* [rise up](#).

If you're tired, you aren't delegating. And if you are, you aren't delegating enough. Delegate *more*.

GET OUT OF EVERYONE'S WAY, INCLUDING YOUR OWN.

I often hear leaders say they won't delegate to someone because it's not in their wheelhouse or skillset to do the work.

It probably wasn't in yours at one point, either. But then you acquired those skills and you entered that wheelhouse.

And *newsflash*: Skills can be taught. Wheelhouses can be shared.

Have you let them try? Do they know you're holding on because of fear?

We can never elevate others if we can't elevate ourselves. We can't ask more of others if we don't ask more of ourselves.

The greatest gift in leadership is seeing others elevate around you because you gave away the work.

One more time for those in the back: *Gave it away*. (See also: the opposite of 'hoard'.)

The role of a leader is to influence, teach and coach those around us to be accountable for the role they hold. To achieve the goal. To do the thing. And all without you.

Empower, release and surround yourself with people you can trust to do the job for which they were hired—and reap a windfall of growth.
#delegateordie

As featured [here](#).

HOW TO KNOW IT'S TIME TO DELEGATE

When is it time to delegate?

Is it when you're sacrificing sleep to get more things done? Is it when you're deafened by a cacophony of 'pings' from your phone, tablet, computer—and more? Is it when you're drowning in mounds of paperwork?



I constantly felt like there weren't enough hours in the day—I couldn't keep up.

I was behind. I felt disorganized—even apologetic—that I wasn't getting things in on time or doing the caliber of work that I wanted to be doing.

[T]here were items on my to-do list or really audacious goals that I just couldn't get to because I was so mired in the minutiae.

[Now] I no longer constantly feel behind and overwhelmed, and I now feel like I have a true partner who can support me.

[I]t's the best thing that you can do for yourself, for your health, and for the health and expansion of your business.

So while making this investment can maybe feel like a sizable investment at first, I would say it's come back to me tenfold in terms of my own mindset and my own health, and the health and opportunity for expansion of my business.



DR. TARYN STEJSKAL
CHIEF RESILIENCE OFFICER AT RESILIENCE LEADERSHIP

The short answer is a resounding ‘YES!’ The long answer is more like a ‘YES! How have you gone this long without delegating?! You’re just one person.’

But surprisingly, this question nags many leaders, from Fortune 500 CEOs to solopreneurs.

Why?

Because they reason with themselves that they should wait until someone else can complete the tasks exactly as they would. So they wait ... and wait ... and wa—oh, forget it. ‘I’ll just do it myself.’

But no. Not you. Not since the last chapter, anyway.

You resisted that urge. Now, you’re feeling inspired. Empowered. Ready to take on the world. Ready to have ‘everything under control’—whatever that means.

But this newfound enthusiasm begs the question:

“How do I know if I actually need to delegate?”

This question is one we answer every day. So if you’re wondering if it’s time to really dive head-first into delegation, here are four signs that it’s definitely time ...

1 • YOUR INBOX IS COMPLETELY OUT OF CONTROL.

If your inbox is cluttered, unorganized and woefully neglected, it’s probably time to delegate.

Think about it: When was the last time you reached inbox zero? Months? Years? Never?

Delegation can help you achieve elusive inbox zero—quickly—and then keep it organized.

2 • YOUR ‘TO-DO’ LIST FEELS NEVER-ENDING.

If you find yourself going to bed so late you’ve considered pulling an all-nighter, it’s time to delegate.

Sure, you’re the expert and it’s tough to hand tasks over. But—BIG but—you are burning the candle at both ends. It’s only a matter of time before you crash and burn while still holding that candle all by your lonesome.

Delegation will make sure your walls aren’t fluorescent Post-it Note mosaics anymore.



I started seeing that [other owners] were simply taking their 40 hours a week and able to double that without putting additional effort in [by delegating].

I personally have struggled with staying on top of every small detail while also trying to focus on creating a culture, building an organization.

[But] what we do is sell chicken. I didn’t get into the business to do administrative work or sit in the office. I got into the business because I wanted to serve people.

I truly believe my wife would never allow me to not have support. And my team has just such an appreciation when they’re able to interact with me and see me as the leader—and not the admin guy. That’s made a big difference.



TIM SWEETMAN
OWNER/OPERATOR OF A CHICK-FIL-A

3 • YOUR BUSINESS IS GROWING. AND FAST.

First order of business: Congratulations! This is a decidedly good problem to have.

But if you've had to turn away new clients because you have too much to do and not enough time or help, it's time to delegate.

In the long run, what will cost you more: Hiring someone to whom you can delegate or the loss of revenue from turning away paying customer after paying customer?

Then there's the cost of potentially losing your social media following because you ignore comments and direct messages. And the cost of making financial mistakes or—arguably worse—an audit?

It could almost be argued that you can't afford NOT to delegate to a professional.

Delegation ensures that all the day-to-day tasks are handled so you can get back to doing what only you can do: growing your business.

4 • THERE'S NO TIME TO DREAM BIG DREAMS ANYMORE.

Are you brimming with new ideas—but you never seem to bring them to life? Then it's time to delegate.

Delegate what can be handled by someone else and—*again*—return your focus to the ideas that spark your joy and creativity.

Think: Emails, social media management and engagement, bookkeeping, calendar management—essentially all of the necessary functions of running a business in the 21st century that aren't necessarily the best use of your time.

Because put simply, if you don't have someone to whom you can delegate, you are the person to whom you delegate—and you likely can't afford your own hourly rate to manage *all the things*.

The world needs more revolutionary ideas, not visionaries who are too bogged down with tasks to execute on The Next Big Thing.

HOW TO KNOW IT'S TIME TO DELEGATE

There is one thing—one oft-overlooked and neglected little thing—that, if cultivated and nurtured properly, can change the course of your business. Think you know what it is?

Here's a hint: It's not synergy. It's not culture. It's not brand identity. It's not foosball in the breakroom.

It's *trust*.



Few things can help an individual more than to place responsibility on him, and to let him know that you trust him.—Booker T. Washington

All of the aforementioned things are decidedly and categorically critical, and the foosball table is definitely awesome—don't get us wrong—but all of those can't exist without trust. Trust and just about every other mission-critical element of your business' success are mutually inclusive; they simply cannot exist without trust.

So we have a guiding philosophy—one seemingly small approach to trust—that yields a huge impact: We choose to fill all gaps with trust, knowing that we are all here to serve one another. We even encourage filling the gap with trust even before you feel like someone has earned it.

Sounds crazy, right? But from day one, if you fill the gap with trust, the momentum will pick up *big time* in your relationships.

But—and this is a relatively big 'but'—this does come with a big caveat: It comes with recognizing that mistakes *will* happen.

Not if; *when*.

And even then, what do we call on each other to do? We encourage each other to—yet again—fill that gap with trust and really believe the best in that person.

Why? Because we all make mistakes. And just as we've been instructed by the Golden Rule, we forgive because we, too, want to be forgiven.

Building a culture of trust is the single most important goal you can have as a leader. Employees in high-trust organizations are more productive, more energetic, more collaborative, stay with their employers longer, and take ownership of their work and the outcomes as a whole.

Think it sounds like new-age, nebulous, nuanced corporate-speak? Think again. Consider that employees in self-described ‘high-trust workplaces’ [report](#) that they are ...

- **106 percent** more energetic at work
- **76 percent** more engaged with their jobs
- **74 percent** less stressed
- **13 percent** less likely to take sick days
- **29 percent** more satisfied with life in general*

*‘With life in general’ is important to note as every aspect of our lives is connected and interwoven. Our professional lives and personal lives don’t exist in vacuums.

These are remarkable statistics, giving tangible, quantifiable weight to an otherwise abstract *feeling*.

So take that leap of trust—trust in your ability to hire world-class employees and their ability to do exactly what you entrusted to them in the first place—and be prepared to reap the rewards.

RESOURCES



[How to Build Trust Checklist](#)



[How to Maintain Trust Checklist](#)



[Evaluating Trust Worksheet](#)

DELEGATION: THE BUILDING BLOCK OF TRUST

You can *tell* someone you trust them, but if you're not putting your money—and their paycheck—where your mouth is, it amounts to nothing more than lip service. You can *tell* your teenage child that you trust them to drive your car, but if you never hand over the keys, your actions paint a different picture.

At work and in life, trust is a currency. And just like a currency, it can be earned and saved over time—and depleted in seconds.

So how can leaders show their trust? Delegation.

And not the 'dumping-busy-work-on-someone-and-micromanaging' kind of way. But the kind of **delegation** that entrusts people with key projects, offering support only as needed. This, incidentally, also benefits from the same compounding, multiplying effect as currency—the more you invest and entrust, the more you equip the employees of today to be the great leaders of tomorrow.



I think at the end of the day, you just have to just go for it. Delegation only works if you have a 100-percent trust.

[With trust], my stress level has decreased a lot, and [that trust] gave me back time—and you can't put a price on that.



RACHEL LAWSON

OWNER AND SOLE FOUNDING MEMBER OF SCHAFFER LAW FIRM

HOW?

Because when you teach an employee how to do a task—equipping them with the necessary tools, skills and information—and delegate responsibility, you are showing them that you trust them; your actions say, ‘I trust you to do a good job.’

To earn, build, and compound trust with your employees, start by asking yourself the following questions.

- Do you treat employees like business partners? If not, start by asking for their input—and *listen*.
- Are you true to your word? If not, make sure that if you say you’ll do something, you *actually* do it.
- Are you proactive in delivering your contributions? If not, start anticipating your responsibilities that impact how others do their jobs and deliver on them—without being asked or hunted down.
- Do you ask for help? If not, consider asking as needed to let your employees know that you value how their role and input contribute to the success of the business.

If you answered ‘no’ to any of the above, then consider those your next-step action items to improve upon.



ENTER YOUR GENIUS ZONE

With trust firmly laid as your organizational foundation, it's time for you to prepare to enter the zone.

The zone ... of *genius*.

As much as we'd like to take credit for that amazing nomenclature, the *Genius Zone* is the brainchild of author Gay Hendricks. In his book, *The Big Leap*, he outlines four critical aspects of function.

SUMMARIZED, THEY ARE...

THE ZONE OF INCOMPETENCE



You engage in things you inherently do not understand or are not skilled at.

THE ZONE OF COMPETENCE



You do what you are efficient at, but your skills don't distinguish you in any significant way.

THE ZONE OF EXCELLENCE



You do things you are tremendously skilled at by cultivating, practicing, and establishing those skills over time.

THE ZONE OF GENIUS



You capitalize on your innate natural abilities rather than those learned. Here, you find your flow, and with ceaseless inspiration, you produce things that are distinguished and unique in ways that excel beyond what anyone else is doing.

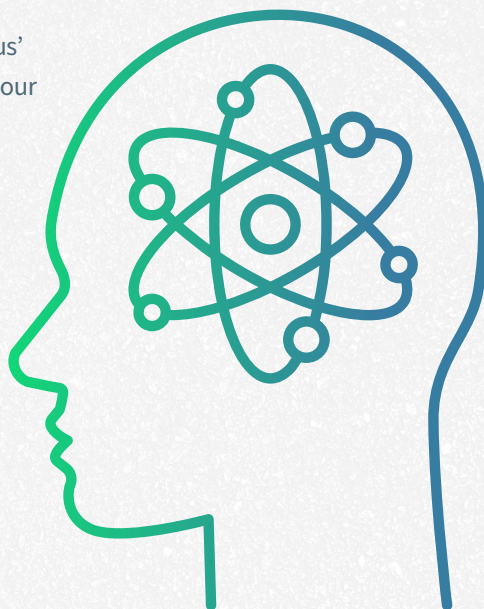
And not to butter you up or anything, but we feel pretty confident in assuming—especially if you’re reading this—that you’ve likely cruised past the first two zones and now reside comfortably in the Zone of Excellence.

But you can’t exactly do all the things, solve all the problems, and build a business primed for accelerated growth subsisting in the first two, right?

Right.

Working in your ‘Zone of Genius’ means you’re capitalizing on your natural abilities and, as such, there exists virtually unlimited potential and power in capitalizing on what makes you inherently *you*.

But your natural abilities may not include certain tasks because unfortunately, no one’s natural abilities include all the things.



With a commitment to a full-time residency in your Zone of Genius, your business stands to reap a windfall of accelerated growth.

But you can only get there by—you guessed it—**delegating**.

CONDUCT A DELEGATION AUDIT

With all of those fundamentals, foundational revelations, insights and confessionals behind us, it's time to look forward.

DELEGATING 101 PART 1: THE QUESTION AUDIT

Smart and efficient leaders adopt the 70-percent rule. Simply put, the 70-percent rule says that if the person you'd like to perform the task is able to do it at least 70-percent as well as you can, you should delegate it.'

Sure, it will prove difficult to accept that the task won't be done exactly as you would do it and with the same degree of (perceived) perfection. But you know what it will be? DONE. And sometimes, that's really what matters most.

And after you've asked yourself, 'Can this person do this task 70-percent as well as I could?' you're ready for part two.

DELEGATING 101 PART 2: THE TASK AUDIT

The [Harvard Business Review](#) takes it one step further, suggesting leaders break down delegatable tasks into six divide-and-conquer categories as follows for more effective and efficient completion:



TIME-CONSUMING. Time-consuming tasks are often important and complex. As such, you could delegate 80 percent of the research and execution and then assume responsibility for the final 20 percent to give approval.



TEACHABLE. These tasks may initially seem difficult, but can be delegated once you've taught the basics. And like time-consuming tasks, you will assume responsibility by providing quality checks and final approval in the end.



TERRIBLE AT. Know your weaknesses—and delegate them. The devil's in the details so as HBR.com so succinctly explains, '... there is someone out there who can delight in the devil of your details.' Find them.



TIME-SENSITIVE. When a time-sensitive task enters the mix, competing with other priorities, there often isn't enough time to do them all at once. Delegate time-sensitive tasks so you can focus on project-based deadlines.



TINY. Small, seemingly inconsequential tasks are easy to put off—but they add up. They aren't necessarily important or urgent, and often only take a few minutes.



TEDIOUS. Tedious tasks—like repetitive data entry—are typically relatively simple, but often not the best use of your time—and could, therefore, be handled by someone else.

When all else fails, repeat to yourself:



Focus on what only you can do. Give the rest away.

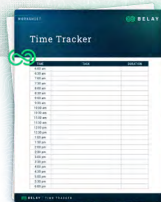
Ultimately, that's what should play on a loop in your head, all day, every day.

Because if the answer to *'Am I really the only one who can do this?'* is an honest—albeit uncomfortable—*'no,'* then it's time to give it away.

And if you vacillate, challenge yourself to answer if you are really, truly the only one—or just the (arguably) *best* one? That is the critical differentiator.

The 70-percent rule will take time to accept and will likely prove difficult to adopt, but something completed 70-percent to your standards—at worst—is still complete. And BONUS! You'll still get that gratifying jolt of dopamine as you cross that task—and countless others—off your to-do list.

RESOURCE



[Time-Tracker Worksheet](#)



DELEGATION IN ACTION:

MEGAN HYATT MILLER

Megan Hyatt Miller is the President and Chief Executive Officer at [Michael Hyatt & Company](#) and the co-host of the popular business podcast, [Lead to Win](#).

As Michael's oldest daughter, Megan is the architect of Michael Hyatt & Company's standout culture, and is committed to helping her team win at work and succeed at life, while also delivering phenomenal results to their customers.

Under her leadership, Michael Hyatt & Company was named as one of Inc. Magazine's Best Workplaces for 2020, which ranks the top companies in America for their employee engagement.

When she's not taking the company to new heights, she's fully present at home with her husband Joel and five kids in Franklin, Tennessee.

➡ THE CHALLENGE

Michael Hyatt & Company has one primary guiding tenet—they

believe in the Double Win, wherein everyone should win at work and succeed at life.

And for Megan, determining what that would look like for her would take a lot of intentionality, teamwork and dedication, especially considering that her five children range from college-age to just having learned to walk.

"We all have our own unique stories of how we came to this idea of the Double Win," Megan shares. "I married my husband in 2009 and had two instant kids—bonus children right from the beginning—who are now 19 and 17.

"A couple of years later, we adopted two boys—they were three and 14 months at the time—from Uganda, who, as it turns out had some significant special needs that were not apparent to us at the beginning. As we kind of walked down that journey with them, my career was simultaneously taking off.



DELEGATION IN ACTION:

MEGAN HYATT MILLER

“And as time went on, my dad, Michael Hyatt, said, ‘I really want you to take over running the company and step into this Chief Operating Officer role.’ It was my dream. I couldn’t imagine saying no, but I didn’t know how I could possibly do it.”

But, ever committed to practicing what they preach, Megan and her father found a way to make work work for them.

“I said, ‘When they get home from school, I have to be present,’ she explains. “I can’t turn them over to a nanny; they can’t stay after school. They had therapies and various things. And he said, ‘That’s fine. Just be done with work at 3 p.m. If you’re able to produce results 9-3, that works for me.’”

So she gave it a shot.

But in working through what a Double Win would look like for her and her family, Megan realized that the same obstacles likely prevented other leaders from winning at both work and life—

but why?

“It’s the million-dollar question that our clients ask us all the time,” she says. “It’s the question that we see in the media, one most of us have asked ourselves, and I think it’s a couple of things.

“First, we live in a culture of overwork. A cult, really, where we think about work as our primary orientation for life. It’s where we measure our success, and we really think that work-life balance is a myth. There aren’t a lot of good examples around us where we can look at somebody’s life that we respect and say, ‘Oh, they’re doing it. They’re really doing it.’

“Instead, what we see is the glorification of overwork and people like Elon Musk and others who were sleeping on the couch in their office and ignoring their five kids and just abandoning a lot of things outside of work. And I think the consequences of that are tragic to our potential



DELEGATION IN ACTION:

MEGAN HYATT MILLER

professionally, but also, of course, to everything that's important outside of work.

"What we don't want to have happen is that we drift to a destination we wouldn't have chosen. And if you look at people who have a lifetime of chronic overwork, they've bought into this cult of overwork. What you see are so many regrets. There's just time that's lost—time with their kids, time with their parents, time with their friends, time with their spouse—that just can't be recovered; it's too late."

➡ THE SOLUTION

It's what they hear most often from their clients, and striking that balance usually means dismantling what the public at large believes 'balance' is.

"[They think] it's an equal time spent at work and at home—but that kind of rigidity doesn't really ring true to most of us," she says. "I think if you think more about it like a balancing act of walking on

one of those slacklines—adjusting weight side to side, making these micro-adjustments.

"But it really starts with vision. I'm passionate about vision—and a Double Win is a well-rounded vision for your life and a well-rounded vision for your company."

But therein lies another obstacle: Megan has found that while many people have professional goals, few have personal goals.

"How are you deepening your relationship with your family and your children?" Megan challenges. "Is there a hobby you want to learn or a skill set you want to pick up? People who don't take their personal life as seriously as their professional life may drift personally because they haven't taken the time to be intentional about growing outside of their careers.

And it goes back to vision.

"First, I would think of a vision for your life outside of work. What



DELEGATION IN ACTION:

MEGAN HYATT MILLER

do you want? What do you want your life to be like outside of work? What are your dreams? What are your goals? What's your vision for who you want to become and what you want to achieve outside of work?

"Next, put hard edges on your day—maybe it's 9-3, like in my case. Or maybe you just say, 'When I leave work, I'm going to take the apps off my phone. I'm not going to check email. I'm not going to check Slack. I'm not going to check in on the weekends.'"

Megan also recommends creating an actionable plan to successfully execute on—and commit to—with your family.

"Several years ago, my husband and I went through the process together of creating a life plan," she shares. "I feel like it brought us close in a way that only becoming aligned around the most important aspects of your life really can. And it got us really excited about our future.

"[This] is also baked into the [Full Focus Planner](#) so you have the opportunity to tweak it on a quarterly basis. Because at least a couple times a year, something will change—maybe you have new responsibilities or you've hired someone and given something away that you're no longer doing and you need to keep it updated.

"You really maximize not only your productivity, but your time spent on high-leverage activities—meaning you get a disproportionate return on investment of your time, and these are really the activities that drive your business.

"We want to be spending as much time as possible doing those things as opposed to things that maybe are urgent, but not necessarily important.

"I've outlined the core of my responsibilities so I'm not just bouncing randomly from one thing to the next. I'm really batching things that are similar



DELEGATION IN ACTION:

MEGAN HYATT MILLER

together that require a similar kind of energy so that I can shift my focus without being interrupted by distractions and a lot of switching all the time, which is counterproductive.

And finally, that which cannot wait but can be delegated is—even personal tasks.

➡ THE RESULT

“Somebody else can empty the dishwasher. It does not have to be me,” she says. “My kids will not remember that. They’re not going to look back and say, ‘Man, mom was so good at unloading the dishwasher. Every time I got clean laundry, I just thought about how grateful I was for her.’

“No, they’re not going to think that. They’re going to think about the time that I read the story or when I went to the practice or the game or the special trip we took—those high-quality moments are what they’re going to remember.”

And Megan determines what is

worthy of her time—and what isn’t—with one simple question.

“Is this really high-leverage? And if it’s not, then it’s a candidate for delegation.

“It’s such good advice, especially for women. Maybe you send somebody to get some dry cleaning for you or order lunch, but you’re not really thinking about your personal appointments—you know, all the things that have to do with running your personal life and your home—and those are all candidates for delegation.

“And that’s a level of magic that, once you unlock it, man, you are really gonna get your life back.”

As featured [here](#).

GETTING YOUR MIND(SET) RIGHT

By now, you're hopefully ready to put rubber to road—which is perfect—but we have just a few more housekeeping items to cover.

Because while you may be champing at the bit to get started, the more you prepare now, the more success you can expect later. So don't be discouraged.

Remember: An ounce of prevention is worth a pound of cure, right?
Right.

SO LET'S GET OUR MINDS RIGHT WITH THESE FIVE PREPARATORY STEPS.

1 • ADMIT YOU HAVE A PROBLEM.

We covered this earlier, but there will be no future success if there isn't a present admission that you need help. You want help. And that you're willing to ask for—and accept—help.

2 • ACCEPT THAT IT WILL TAKE TIME.

It won't come naturally—why? Because naturally, you feel most comfortable being—or *feeling like*—you're in control.

So learning to delegate is like exercising muscles that are used to melting into a recliner. At first, it's uncomfortable. It feels weird. It hurts. Your muscles want to return to the recliner and be left alone.

But then something crazy happens.

The more you exercise those muscles, the stronger they get. Suddenly, what used to hurt now feels good, and lifting those weights gets easier. It just takes practice and consistency.

3 • BE WILLING TO TEACH.

The best delegators are those who are willing to invest time in proper onboarding and training.

Yes, this will require some heavy lifting on the front end, but will result in incredible returns, and will prove to be one of the most profitable investments you could make for yourself and your organization.

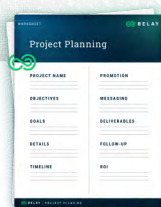
4 • HAVE A PLAN.

Successful delegation while working remotely involves a plan for task management. Without a system for tracking projects and tasks, you'll find yourself buried in sticky notes—which are great for grocery lists, but not for business.

If you're serious about delegating remotely from home, consider a system to track tasks and projects once you have let them go—and you *will* let them go.

Task management systems such as Asana or Trello can help streamline processes and simplify workflows. These tools provide a central location for tasks to live and evolve collaboratively so you'll never have to wonder what's getting done or if something has fallen through the cracks.

RESOURCE



[Project-Planning Worksheet](#)

5 • SHIFT YOUR MINDSET.

Instead of thinking you have to do it all, look to delegation as an opportunity to empower others on your team to grow, even when working remotely.

Lean into your team to discover ways you can improve. Be open to suggestions and receptive to feedback. Be coachable and teachable. Delegation requires discipline, consistency and patience.

RECOGNIZING THAT THESE PATTERNS DON'T SHIFT OVERNIGHT IS IMPERATIVE TO YOUR SUCCESS AS A LEADER.

PEDAL, MEET METAL

NOW THIS IS WHERE THE RUBBER MEETS THE ROAD.

1 • IDENTIFY WHAT YOU SHOULD—AND SHOULDN'T—DELEGATE.

This goes back to the six T's we listed in Chapter 10.

The most important outcome of delegation is giving you the time and space to focus on doing what only you can do. The 80/20 rule says that 80 percent of your results come from 20 percent of your efforts, so effective time management suggests that you spend 20 percent on the task(s) that will yield the greatest results.

BONUS: With that in mind and to help you get started on the right foot, we've created a Delegation Matrix to help you map out the various things you do each day so you can determine what you keep and what you hand off.

2 • IDENTIFY THE PEOPLE WILLING AND ABLE TO TAKE ON MORE.

This is arguably one of the most mission-critical steps because sure, you can tell someone to return a phone call or order toner, but can you delegate important tasks to them? And more importantly, how do you know if you're delegating the right tasks to the right person?

This is when the 70-percent rule—the one that says that if the person you'd like to perform the task can do it at least 70 percent as well as you can, you should delegate—comes into play.

RESOURCES



Must. Could.
Should.
Worksheet



Delegation Matrix
Worksheet

3 • COMMUNICATE. COMMUNICATE. COMMUNICATE.

A recent survey found that 38 percent of respondents named communication as their key issue. Calls, texts, and voicemails work fine for casual conversations, but to emphasize a deadline or celebrate an accomplishment, try to cater communication to the style(s) each employee prefers to help them stay connected in the manner that best suits—and motivates—they.

Some may prefer more video conferencing while others may prefer written communication—and recognizing those individual preferences will go a long way to let them know you care.

4 • GIVE A WIDE BERTH.

This is where things can feel vulnerable and maybe even scary. This step is essential, but also the most challenging. From this point on, it's imperative to have faith in your delegation process and people. So while it may be hard to let someone else take the reins, fear not! Because if you committed to the first three steps, you and your team should be *primed* for this very moment.

Training wheels: OFF

This is when you fill the space you've given with trust, turning tasks over to your employees once they exhibit consistently sound decision-making and reliability.

RESOURCE



Communication 101 Quiz

5 • CELEBRATE WINS, BIG AND SMALL.

Not every accomplishment on this journey will warrant ticker tape and a parade. Some wins will be small—maybe even imperceptible to the untrained eye—but a win is a win and merits recognition. And thankfully, even the smallest gesture—‘*Great job!*’—can go a long way in motivating your team. Similarly, never underestimate the power and impact of manners. ‘Please’ and ‘thank you’ still go a long, long way.

And listen. We’re not trying to sugar-coat anything so we’d be remiss if we didn’t mention those times—may they be few and far between—when things don’t quite go as expected. *It happens*. But do you know what mistakes are? Diamond-in-the-rough opportunities to continue building trust through open, honest communication and repeated efforts. There’s no winning-and-losing here; just winning-and-learning.

6 • BE PREPARED TO GIVE FEEDBACK.

Whenever possible, it’s always best to give immediate feedback so no one is left to wonder if they’re going in the right direction.

Weave feedback into your everyday dialogue so no one ever has to guess where they stand with you.

The Whys

- It addresses blind spots, challenges people to grow daily, and expands their opportunities.
- People want to know when they aren’t hitting the mark; they want to do well.
- Status quo kills morale.
- It moves the ball forward.

RESOURCE



Feedback
Worksheet

The Hows

- **Tone.** Frame feedback as a positive experience by talking about it often and setting the expectations that it is a gift.
- **Frequency.** Do it in your day-to-day. Give more in-depth feedback or coaching on weekly 1:1s or at quarterly review time.
- **Method.** The best method for giving feedback is in-person or on video conference.
- **Applicability.** Feedback needs to be actionable with time-bound, expected next steps.
- **Follow-up.** Inspect what you expect. Check and review the progress daily and weekly until you see continued improved results, then pull back.
- **Reciprocity.** Encourage your team member to give you feedback, too.

ACHIEVING DELEGATION LEVEL: BLACK BELT

As with anything, practice makes progress—you didn't actually think we'd say *'perfect,'* did you? We're not in the business of selling *'perfection,'* only productivity.

And that takes intentionality. Every day.

So here is step-by-step escalation for effective delegation, from beginner to expert, and how to unlock each until you reach Delegation Level: BLACK-BELT MASTER.

And **BONUS!** As you level up, so do your employees.



Wax on, wax off ... then time off!

Sure, we glazed over a few steps that earned you your black-belt mastery, but the end result is the same: A business poised to grow and succeed with employees who are equipped to shoulder the responsibility just as you would—because you trained them to do just that.

Now, all you'll need is to figure out what to do with all that free time ...

Alexa, play 'Leaving On A Jet Plane.'

LET GO, AND LET THEM

Now that you've handed them the proverbial keys as we discussed in Chapter 6, you should take stock and comfort in the fact that you've taught them well.

You've taught them everything you know, in fact, and maybe a few things you've learned along the way, too. You've nurtured them. You've loved them, and you've poured into them. And now the time has come to let them go.

So with keys in hand, you watch them drive away.

And sure, there will be sleepless nights. You'll lie awake wondering if you've made the right decision. Should you give them all this freedom—can you really trust them? Will they make good choices? Will they make you proud?

But ultimately, you take stock in the fact that others have gone through this exact same experience—and even **lived to tell the tale**—so lean into these guardrails when you get an itchy micromanagement finger.

REMEMBER TO...

WORK ON THE BUSINESS, NOT IN THE BUSINESS

Keep your eyes on the prize: When it comes time to sell your business, you'll actually have an asset to sell—and not just a job where you happened to be the boss.

THE HOLY TRINITY OF TRUST

The first in the trust trinity is, well, trust. You *have* to trust other people to take on what you currently own in the business.

The second is training. You *have* to train them—not just for the job that you've been doing, but also guide and train them for what you envision for the role.

Then you have to transition. You have to get out of their way and *truly* allow them to lead so that every decision, every idea and every problem doesn't have to filter through you.

That's the underpinning to make it all work.

DON'T BE THE HERO

Leave that to your team. Business owners think they have to be the hero for everything—that they have to solve everything and everything has to go through them.

But we're not heroes.

Empower people to solve problems on their own so *they* can be the hero.

MOST MISTAKES ARE PAPER PROBLEMS

Try to not worry about mistakes.

Sure, mistakes have consequences, but most of the time, the mistakes are—in the grand scheme of things—relatively insignificant.

And as long as we learn from it, we're OK. Unless you're in healthcare or are a first-responder, our mistakes aren't life or death. They happen, and we can recover from them.

You want employees who aren't afraid to make a mistake or decision so that nothing is delegated back to you.



I know what I'm good at, and I know what I'm bad at, and if I'm going to hire someone to do something, I want them to be able to do that job.

I don't want to stand in the way, and I don't want to hire someone and then also try to tell them how to do what I hired them to do.



CALEB SUTHERLAND
FOUNDER AND CEO OF LIT DEVICE LLC



DELEGATION IN ACTION:

KATIE LANTUKH & ARI ADLER

As a certified StoryBrand guide with **Murphy Marketing**, Katie helps people know what to say on their websites.

She recognizes that it can be hard to stop running your business long enough to create effective messaging. But she believes your words matter.

For the past 10 years, she's been helping organizations such as Pilot Flying J, Seen&Heard, and Help The Persecuted find the right words to express their cause and to invite others to join in.

➡ THE CHALLENGE

"It was honestly just chaos."

That's how Katie described life before her BELAY VA Ari Adler. More on him later ...

She was handling everything on her own: her actual deliverables, sending invoices, scheduling—only to discover that her Calendly wasn't working half the time. Everything was on her shoulders and in order to get everything

done, she had to stay up late.

We're talking working until 3 a.m. most days.

Her other super demanding job?

Being a mother to two small children.

"We were burning the candle at both ends, like to the clinical definition," Katie shares. "And I was just at my wit's end."

"I needed help—and I needed help now," she continues. "And I didn't want to go through the interview process; I just didn't want to do any of that. I knew about [BELAY] and it just seemed like the light at the end of the tunnel for me. I could get somebody that knew what they were doing that they could start within a month."

A tall order, but BELAY delivered.

➡ THE SOLUTION

So start Ari did—and Katie decided to jump in with both feet, choosing to fill gaps with trust while meeting once a week.



DELEGATION IN ACTION:

KATIE LANTUKH & ARI ADLER

Her thought process?

“If BELAY trusts this person, then I’m going to trust this person,” she says. “And right out of the gate, I had him in my inbox, in my calendar, and sent every login that he would need. And it was overnight.”

And her trust paid off—quickly.

First order of business? Bringing order to her chaotic inbox.

“[He] color-coded everything,” Katie says. “So when I get into my email, I know to take care of the red things first, and then the yellow things. It’s so helpful.”

But beyond the usual suspects for a VA—email, scheduling and more—Ari proactively stepped in to bring even more order to Katie’s business.

“[Ari] had a lot of initiative,” she shares. “And so he’s always thinking of ways that we can improve our systems and make things better.”

So they started with Trello.

“He was able to see the big picture and see what the problem was and how to actually solve it—[and] not just doing tasks that I asked him to do,” Katie says.

And implementing new systems and leveraging project management platforms has worked wonders for Katie.

“I can list out the tasks that she needs to focus on [and] the projects that I’m working on that week,” Ari adds. “And it’s just a great reference point [that] you can keep going back to throughout the week as you need.”

“I finally felt like I didn’t have to think of everything,” Katie shares. “I had somebody that was helping me think of everything.”

➡ THE RESULT

When paired with Ari, Katie’s short-term goal was to not work at night—which she no longer does.

Check! ✓

Long-term, she wanted to be more



DELEGATION IN ACTION:

KATIE LANTUKH & ARI ADLER

present in meetings, grow her business, and spend more quality time with her family.

“Having Ari [gives] me the headspace and the bandwidth to even think through things because before, it was just like, ‘I’ll have to focus on what’s coming in,’” Katies shares. “‘I have to put out the fires.’ Now it’s kind of like, ‘Oh, well now we have some space to breathe and think and actually dream about what might be possible.”

Double check! ✓✓

As featured [here](#).

THE WINS OF DELEGATION

GRADUATE FROM ‘WORKING ON THE BUSINESS’ TO ‘WORKING IN THE BUSINESS’

For some of our more dubious readers, we realize you may have just jumped right to this section for more convincing.

You’re a ‘dessert-first’ kind of reader. Can’t say we fault you.

After all, we did kind of bury the lede here—but with good reason. Because while you can skip pages in a book, you can’t reasonably expect to skip any of the steps in this book and still get here.

This isn’t “Choose Your Own Adventure,” and there are no “CliffsNotes” for effective, masterful delegation.

But if you needed (more) convincing—and especially if you rightfully earned your way to this page—here’s what you can expect to reap from all you’ve sown by delegating.

And every win, every success, and every step toward the growth we’ve experienced comes down to one illuminating statement business owners everywhere should use as their organizational North Star:



You don’t own anything. The day your business doesn’t need you day-to-day is the day that you own the business. Until then, you run a business.

YOUR MASTERFUL DELEGATING WILL YIELD ...



1 • SCALABILITY.

As your company grows (Well done, by the way!), you can hand over new tasks and things that were once your responsibility—that now likely fall out of your scope—and instead pour into where your expertise and time are now needed to push your business forward.

Now, your time, talents and treasures can be better spent doing that which only you can do: Growing your organization. Nothing more.



2 • EMPLOYEE DEVELOPMENT.

Delegation provides your employees with new challenges and opportunities for growth.

Bottom line: Your future leaders are hiding in plain sight within your organization.

And by developing employees at all levels today, organizations can identify more people who have the potential to be effective leaders to deepen their leadership bench for tomorrow.



3 • TRUST.

We know; we really repeat this one—but we also really, really believe in the multiplying power of trust.

Trust begets trust, so extending trust and empowering them to do that for which they were hired earns you trust in return, so when challenges arise—and that's a 'when' not an 'if'—your team will be ready to follow your charge.



4 • UNITY.

Delegation is like solving a puzzle as a team: Everyone knows that although they aren't responsible for all the puzzle pieces, their work contributes to the greater good—and that is endlessly motivating.



DELEGATION IN ACTION:

VIRTUAL ASSISTANT HOPE WARD

Most business owners know the struggle too well: They work themselves *tirelessly*, day in and day out. And nights, too, if we're being really honest. They have their hands in everything and know every nuanced *everything* of their business, arguably better than anyone else. Still, they know they need a vacation; they know they need a break.

But they're business owners: It's their job to run the day-to-day operations of their business—their baby—and much like a parent, they can't imagine leaving it in the care of anyone else.

After all, who could possibly love and care for this baby as well as they could?

They just need to have a little faith. Hope, even.

Hope Ward their Virtual Assistant, that is.

And with Hope at the helm, they took a three-month family sabbatical last summer.

We'll give you a minute to process '... a three-month family sabbatical.'

And it all started with one out-of-office auto-reply.

WARNING: The following may make you uncomfortable. Anxious, even.

Because it's not often when executives or business owners share messages like the one below, and we apologize in advance for any discomfort or temporary paralysis it may cause.

Sabbatical Out of Office ...

From: Bryan M.
Sent: Wednesday, July 3, 2019 12:54 PM
To: John Smith
Subject: Sabbatical Out of Office ...
Re: Can we connect?

Thanks for your email.

I am excited to announce that my wife and I, after years of company growth, are taking a sabbatical with our kids. As a result, I will be out of the office, not checking my emails until Tuesday, September 3rd, 2019. In our absence, our COO will be acting in our place while we are away.

During our sabbatical, all emails will be forwarded to my amazing and capable assistant as they arrive in my inbox. She will review these emails throughout the day, but if your question is urgent, please reach out to her directly in a separate email.

Please note: ALL messages will be deleted from this email account as they arrive.

Why?

So I don't return to an inbox full of messages that have already been resolved.

So I am not tempted to check email while I am gone.

So I can fully disconnect and be present for my wife and kids.

If for some reason your issue is not resolved before I return, please resend your message after Tuesday, September 3rd, 2019.

Thanks,

B



DELEGATION IN ACTION:

VIRTUAL ASSISTANT HOPE WARD

Feel free to take a moment to compose yourself and reach for the nearest paper bag if you find yourself short of breath.

So, is your jaw off the floor now? Good. Because while this is an exceptional story, it doesn't have to be a Bryan-and-Shannon exclusive.

Here, we sat down with the miracle worker herself—virtual assistant extraordinaire Hope Ward—to have her share her secrets.

First, the basics: Why did you become a VA?

“Ironically enough, I did not select this role, per se, nor did I set out on a path to find it—it kind of found me.

“But, I do 100-percent feel that it is a calling, and while I did not necessarily seek it out, it found me for a reason, and I fully believe it's what I was meant to do.

“I like to be around business-minded people; I like to be challenged to think critically and try to create an environment of

growth and opportunity. I have been fortunate in my roles as an assistant to be able to work with leaders who have welcomed me into that space with them and allowed me to have a true hands-on experience and infinite learning opportunities along the way.”

How long have you been with BELAY?

“I began my career with BELAY as a Relationship Manager—now known as a Client Success Consultant—in October of 2017. [And] in December of 2018, I moved into my current role supporting Bryan and Shannon.”

What do you love most about your job?

“I love the variety of different tasks, activities, and subject matters with which I get to be involved. A lot is asked of me, but a lot is also entrusted, and I sincerely appreciate and value that trust and responsibility.”



DELEGATION IN ACTION:

VIRTUAL ASSISTANT HOPE WARD

Now, let's give the people what they want: How did you help Bryan and Shannon prepare for their epic vacation—or sabbatical in your case?

“Our preparation for [their] sabbatical actually started about six months out.

“We had a lot of dialogue—bi-weekly meetings leading up to the date—about how we would need to prepare and what things would need to be paused or redirected during their time away.

“We created a comprehensive, detailed list with an associated timeline for each item and who would be responsible for taking that over during the sabbatical. We had a lot of discussion around what-ifs, and if/how the client would like to be notified and/or brought in if needed.

“We created a short, very well-defined list of scenarios that we all agreed would be shared immediately if any of those should arise in their absence.”

What did you hope to accomplish with the list of hypothetical scenarios?

“Any leader can have a lot more peace and confidence to step away if they know they have already identified the parameters and/or non-negotiable reasons/ scenarios in which to alert them while they are gone.”

And while they were gone, how did you support them?

“My day-to-day activities while they were away shifted into a lot more filtering and directing communication since they were not seeing anything that came to their email that I was managing.

“Prior to their departure, we had developed a system for what types of information should be forwarded if needed. The key to the communication being successful and effective during their absence hinges completely on the out-of-office response that they chose to set for their emails



DELEGATION IN ACTION:

VIRTUAL ASSISTANT HOPE WARD

while they were away.

“It was completely honest and heartfelt, and this method ensured that anyone and everyone who reached out to them via email during their time away received an immediate response from them—crafted by them—explaining their decision to take a sabbatical and who they had empowered to respond on their behalf. Genius!”

What challenges or obstacles arose in their absence—if any—and how did you handle them?

“Luckily, there were very few—if any—situations that came about during their time away that required me to involve them.

“Our extensive preparation ahead of time really paid off, and we all knew who was responsible for what. So, we rallied around that plan and each did our part and essentially never missed a beat!

“That is not to say that I did not have any questions come up

during that time, but I utilized my internal resources along with my gut instincts and best judgment and it all seemed to work out great!”

Absolutely no surprise that nothing came up with all that preparation. How would you advise other VAs to successfully do the same?

“Building trust is key—and often takes time.

“But, proving that you are trustworthy is easy. Gaining trust with your client will bring confidence to the relationship on both sides. It is not always about knowing or having all the answers as much as it is about showing that you can be resourceful and go find the answers.

“Be an extension of your client so that they can feel confident in your abilities and empower you. Take pride in being able to support them so that they can willingly step away with peace of mind.”



DELEGATION IN ACTION:

VIRTUAL ASSISTANT HOPE WARD

What would you want our BELAY clients to know about leaning on their VAs to go on vacation?

“Identify and articulate any major situations and reasons that the client would need or want to be alerted immediately so that there are very clear parameters and expectations.

“Practice some if/then scenarios with each other so that you can both feel extremely confident in what would need to happen in those cases and how it would be handled. This can actually be a pretty fun exercise.

“Having an out-of-office response from the client explaining their decision to step away and not be available is a game-changer and even gives the reader more confidence in the person that is being empowered to communicate on behalf of the client in their absence.”

What is one thing about what you do that makes you excited to get up tomorrow and do it again?

“I feel very valued and appreciated for what I do, and that absolutely continues to encourage and excite me every single day!

“I feel a huge sense of responsibility, and that drives me to want to ensure that it all happens the way that it needs to. I want my clients to have the utmost confidence in not only my capabilities to perform my job, but also in my ability to care for their businesses in the same ways that they do.”

As featured [here](#).

CONCLUSION

When it comes to experiencing new growth in your business, you have to think differently about how you run it.

If you want to see growth, you have to realize that you can't do everything on your own.

You are a business owner, a visionary, and the person at the helm steering the ship, figuratively speaking. And like any successful business, there are divisions to the work that needs to be done.



You just can't do it all as a leader.

[By delegating,] I've gained so much in terms of saving time, saving automation, and I feel like I can see more clearly as a leader.

I have the time to look forward where before it was reactionary because there are so many inbounds coming to you as a leader.



DAVE RODRIGUEZ
CHICK-FIL-A OWNER/OPERATOR

And sure. You *could* create email campaigns, track down leads to set up meetings, do your own expenses and manage your social, but why would you? Why would you want to spend your valuable—and expensive—time on tasks that can easily be delegated to someone else?

Delegating can help remove the burden of important, but low-value tasks from your responsibility. And as those to whom you delegate handle more and more tasks, you get more and more time to focus on that which only you can do: Growing your business as the owner, visionary, dreamer, and big-idea-haver.

Done right, the investment more than pays for itself.

Remember, delegation isn't simply a way of unloading your responsibilities; it's how business owners and leaders can benefit from the powerful, multiplying effects of entrusting others to do that for which they were hired.

Because remember, as you delegate, you not only free yourself from a busyness mountain of your own creation, but you also, in turn, develop the kind of employees and leaders that allow you, them and your business to grow.

**YOU'VE GOT THIS,
AND DELEGATION
CAN HELP.**



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How to Build Trust: A Checklist

You can tell someone you trust them but if you're not putting your money – and their paycheck – where your mouth is, it amounts to nothing more than lip service. You can tell your teenage child that you trust them to drive your car but if you never hand over the keys, your actions paint a different picture.

At work and in life, trust is a currency. And just like a currency, it can be earned and saved over time – and depleted in seconds. Here are the seven critical elements to building trust.

Ask yourself: Do you demonstrate ...

○ **TRANSPARENCY**

Vulnerability and transparency at work can be found in many opportunities. Getting over the fear of being embarrassed, for example, is an opportunity to give any and all ideas you have to solve a problem. Another is getting over feeling like you need to prove your title and importance, instead taking the opportunity to be a servant to your clients and your team.

If you as a leader, for example, are told you and your team must achieve a specific bottom-line performance this year and if you don't, you'll need to cut staff, communicate that to your team. While it can be daunting to express something that may concern people, openly sharing your goals – and concerns – with your team demonstrates transparency and trust.

○ **RESPECT**

Respect is as simple as the Golden Rule: Treat others as you'd like to be treated.

It's recognizing that everyone has rights, opinions, wishes, experience, and competence. It's also recognizing that despite our concerns and insecurities, you all likely share a common goal: wanting to do your job successfully.

So lead by example. If you say your meeting is at 10 a.m., don't be late. If you say you want honest feedback, don't punish those who trust you with an opinion you may not share.

○ **UNITY**

Pave a broad and clear path for your employees to take their problems to the appropriate individuals – namely up to you and other leaders, rather than sideways or down in the form of gossip – so your remote team has confidence their voices will be heard.

Without that path paved, however, employees will gossip because they feel as though there is no appropriate path to fix their problems, instead choosing to take their problem to someone they know can do nothing about them.

As such, encouraging communication that brings issues and challenges to you demonstrates professionalism that has the power to lift people up – and not tear them down.

Open, honest and direct lines of communication — with no tolerance for gossip — reaffirms your commitment to your team. It says, 'I believe in you. I see you. I trust you.'

○ **CLEAR VISION**

Ask your team to memorize your mission, vision and values – but it won't be just short-term memory recitation.

Be sure to weave your mission, vision and values into every corporate event and every team meeting so they become a shared language for your team and provide the foundation and framework for everything you do.

You want everyone to be able to not only talk the talk, but walk the walk, embodying and reinforcing each value so that in everything you do, you are your culture. Your people are your culture. And everything else will fall perfectly into place.

○ OPEN COMMUNICATION

Your team members are the only ones who can tell you where you hit the mark and where you fall short – so ask them. Then – and this is critical – listen.

Their insights will be invaluable in helping you decide to stay – or correct – course. Consider implementing company-wide surveys to gauge the health of your culture anonymously.

Then, address any issues where you've missed the mark properly. Treat your team like the adults they are and, in turn, you can expect them to do the same when asked to give feedback in their own words – even when it's not easy. Accepting and adapting to feedback from your boots-on-the-ground is the difference between talking-the-company-culture-talk and walking it.

○ FILLING GAPS

Trust is a small word, but it has a major impact on any kind of relationship. And for culture, it is quite literally the tie that binds.

So what we encourage is that from day one, you just choose to fill all gaps with trust, knowing that you and your team are there to serve one another.

We would even encourage you to fill the gap with trust even before you feel like someone has earned it. Because mistakes will happen.

So the best thing you can do for your team is to give grace. Choose to not only assume the best of their intentions despite their mistakes but also try to identify where and how they missed the mark – and make it an opportunity for growth and improvement.

○ HUMILITY

Much like vulnerability and transparency, humility further compounds the intrinsically human elements of your culture. And really, there is no culture without people, right?

Psychological research reveals that intellectual humility actually leads to a multitude of other positive – and some surprising – traits, including honesty, fairness, authenticity, openness to new ideas, and even the ability to make better decisions.

And when you’re inspired, those you lead are inspired. You know that if you serve, those you lead will serve, too. You know that if you lead with a humble heart, those you lead will be humble.

Your Turn

1. WHICH OF THESE ELEMENTS CAN YOU IMPROVE ON OR DO YOU STRUGGLE MOST WITH?

2. WHAT STEPS ARE YOU GOING TO TAKE TO IMPROVE IN THIS AREA?

NOTES

How to Maintain Trust: A Checklist

Trust is a fundamental, foundational building block in any relationship – both professionally and personally. Your team was hired for a reason, right? So communicate expectations, give feedback and then – this is the tricky part – give them the freedom to leverage their particular strengths.

So, now that you've learned to build trust, you'll need to learn to maintain it. Here's how:

○ **COMMUNICATE EXPECTATIONS**

Be sure you're clear from the onset exactly what expectations are of your people and their roles, specifically when it comes to availability, productivity, and meetings.

○ **GET FEEDBACK**

Your team members are the only ones who can tell you where you hit the mark and where you fall short – so ask them. Then – and this is critical – listen.

Some leading questions can include:

1. Is there anything I can be doing better?
2. Do you have everything you need in order to be successful?
3. Do you have everything you need to do this task?
4. Is there anything else I can get or do for you?

○ **DON'T MULTITASK**

Seriously. Somewhere along the way, 'multitasking' was exalted on high, right smack dab next to 'busyness.' And while we've been led to believe that multitasking is the holy grail for effective time management, it's decidedly not. Pick one task, and stick with it – and nothing else – to completion.

○ **DON'T MICROMANAGE**

Are your team members self-disciplined and self-motivated? Can they do their job without the fear of you catching them scrolling social media? Because while they can – and will – be tempted to throw a load of laundry in the wash, you'll still need to trust that they will do the job for which they were hired — without your micromanagement.

○ **CONTINUE TO FILL GAPS WITH TRUST**

While this was mentioned for building trust, it needs to be leveraged for the duration of your working relationship in order to maintain trust. So when – not if – a mistake happens, you again fill the gap with trust and really believe the best in that person.

○ **BE HUMAN**

On the other side of that screen is a person – a person who, incidentally, has chosen to partner with you to help your organization thrive. So those qualities that we consider to be inextricably human – sociability, empathy, compassion, kindness, patience, adaptability and a willingness to learn – are critical to the success of your partnership.

Also, remember that each of your employees has a life outside of work, so demonstrate that you're invested in them as a whole person — not just as an employee. Encourage team banter and listen to what's going on in their lives – a new pet, an upcoming vacation or their new garden – and follow-up with them about it.

Such small gestures go a long way to nurture a meaningful relationship by showing you care.

SELF CHECK TIME: ASK YOURSELF...

- What are you doing to foster great culture?
- Are you extending trust?
- Are you a micromanager?
- Are you treating adults as adults?
- Are you filling gaps with trust?
- Are you asking about tasks in a way that reflects trust or accusation?

Evaluating Trust Worksheet

Think about this question: Who am I struggling to trust and why?

Building trust can be tricky; it's not easy to do. Maybe you're unaware of an area or person that you are struggling to trust. But once you are aware and can address it, you'll be on your way to building a foundation of trust.

Use this worksheet for the next week or so and document where you have questioned trust with your team. Ask yourself why and determine how can you work toward giving it in the future.

SITUATION WHERE YOU QUESTIONED TRUST AND WITH WHOM	WHY	HOW TO OVERCOME THE LACK OF TRUST?

Time Tracker

TIME	TASK	DURATION
6:00 am		
6:30 am		
7:00 am		
7:30 am		
8:00 am		
8:30 am		
9:00 am		
9:30 am		
10:00 am		
10:30 am		
11:00 am		
11:30 am		
12:00 am		
12:30 pm		
1:00 pm		
1:30 pm		
2:00 pm		
2:30 pm		
3:00 pm		
3:30 pm		
4:00 pm		
4:30 pm		
5:00 pm		
5:30 pm		
6:00 pm		

Project Planning

PROJECT NAME

OBJECTIVES

GOALS

DETAILS

TIMELINE

PROMOTION

MESSAGING

DELIVERABLES

FOLLOW-UP

ROI

Must. Should. Could.

Use this as an objective plan for what must get done each day – followed by what should get done and then what could get done.

PRO TIP: Start on 'must' — though you may be tempted to skip to 'should' and 'could.'

With this, you'll now have a better idea of what is important in terms of what you must do and what you can potentially give away.

MUST: MISSION CRITICAL

SHOULD: IMPORTANT

COULD: NICE TO HAVE

Delegation Worksheet

Many leaders actually lose money because they don't delegate.

If you could delegate just a few tasks like email management, appointment scheduling, travel bookings, meeting planning, and expense reporting, you could save yourself 15 hours every week.

Fill in this delegation worksheet below to find out what you can delegate today!

	YOU	OTHERS	
LOVE	1. KEEP List all of the things you love doing. These are the things that make you feel alive. They don't leave you drained but fired up. Think of these tasks as things that only you can do for your business. Sure, you may love picking out your favorite pens at the office supply store but if you can ask someone else to do the task, it doesn't belong on this list.	2. DELEGATE List all of the things that you also enjoy doing (like buying those fancy pens), but that someone else can do for you. Maybe it's monthly expense reporting or booking travel. Another way to think of this list would be from the perspective of what you should lead, teach, coach, and develop others on your team to do.	
	3. DELEGATE List all of the things you really don't like doing on a daily, monthly, or yearly basis. These could be tasks that you should be doing but procrastinate completing.	4. DELEGATE List all of the things you really don't like doing and know someone else can do for you. Be creative – add things to this list like going to the grocery store or updating content on your website. Doing anything in this quadrant is guaranteed time wasted.	
HATE			

	YOU	OTHERS
LOVE	1. KEEP	2. DELEGATE
HATE	3. DELEGATE	4. DELEGATE

Communication 101: What To Use And When

Here's a handy cheat sheet to help you remember to cater communication to the style(s) each team member prefers — and when to use each.

EMAIL

We like to say that we use 'email as the pillar, and instant messaging as the glue.' Let us start by saying that it's such a wonderful tool. Everybody has it on their phone and computer. It's quick, it's convenient, and it's easy.

Response Time

With email, sometimes you get the response you need — and that's when the virtual nod comes into play.

So we've set an expectation on how soon we expect somebody to read that email. These expectations have varied over the years, depending upon what season we're in. Often, a 'virtual nod' isn't necessarily an answer but rather a means of communicating, 'I have this. I'll get back to you.' This sets expectation, acknowledges the sender, lets them know that you see them, and expressly communicates when they can expect a response.

The worst is when you send an email – we've all done it – and you're looking at your watch. It's been three days and you've heard nothing, right?

Tone

Another important email consideration is tone. We're sure you've experienced this, albeit in email or a text. So much can be lost in interpretation when a recipient has to infer the tone of the sender. So just make sure that you're speaking appropriately. Watch the number of emojis that are in there and be direct. Try to leave as little to interpretation as possible.

Necessity

This also often gets lost in email so be sure to exercise not only professionalism, but also necessity. Because let's be honest: Some things shouldn't be an email. For some things, you should have picked up the phone. For other messages, maybe we should've been mindful that the contents of an email had some sensitivity to it.

Maybe those could've been a phone call or video conference, too. Some things just should not be ever put in print. And not necessarily because anything nefarious is happening, but rather out of an abundance of caution or consideration.

INSTANT MESSAGING

We find that an email works for things that can wait and instant messages are for simple, quick questions or clarity – like those times where you would have gotten up from your desk and walked to someone's office. 'I need an answer pretty quickly so I'm just going to walk around the corner.' That's instant messaging. Also consider leveraging the chat's away settings to communicate your availability in real time.

At BELAY, we do all of our instant messaging in Slack.

VIDEO CONFERENCING

At BELAY, we highly encourage video meetings because in the virtual world, most expect to be heard and not seen.

But when you have video meetings with your clients and colleagues, you add another layer of trust to your relationship and make 'virtual' feel more personal.

In fact, we know that after 10 years of being 100 percent remote, most meetings can be conducted using video conferencing.

Video conferencing is – and always has been – a requisite for us. We've made it mandatory because, without it, we can't read body language, make eye contact or forge any sort of a real connection. And a company's culture lives – and dies – by its ability to create and nurture connections.

We conduct a vast majority of our meetings – both internal and external – using Zoom video conferencing, which has been awesome for us. And we also ask that everyone have their video on so we can make the most of the platform – and meeting.

TEXT & PHONE

Our leadership team has a group text, for example – and some of our partners do the same. It's easy, quick communication because everyone has a phone. But just as with instant messaging, it's important to establish policies around someone using their cell phone for sensitive information.

Scenario Quiz

Now, let's apply each communication method to a real-work scenario. This is also a great opportunity to go over these different scenarios with your team members to help them understand when each communication method is preferred/expected.

1. You know that a member of your team is working on something challenging and you had a thought or found some resources that could be a big help to them.

- A. Email
- B. Instant Messaging
- C. Phone/Text
- D. Video Conference/Call

2. You emailed a request that isn't exactly urgent but soon, you'll need a response.

- A. Email
- B. Instant Messaging
- C. Phone/Text
- D. Video Conference/Call

3. You're wondering if that presentation will be ready for Friday's meeting.

- A. Email
- B. Instant Messaging
- C. Phone/Text
- D. Video Conference/Call

4. You need to have a courageous conversation to help someone grow and improve.

- A. Email
- B. Instant Messaging
- C. Phone/Text
- D. Video Conference/Call

1.A 2.C 3.B 4.D

Giving Feedback Worksheet

“WE ALL NEED PEOPLE WHO WILL GIVE US FEEDBACK. THAT’S HOW WE IMPROVE.” BILL GATES

Feedback is an essential part of helping your team members grow. It gives you the time and space as a leader to provide a response to someone's performance.

Use this worksheet as a tool to think through your feedback before you have a meeting with the individual. Get organized and collect your thoughts so that you can articulate your feedback in a way that is constructive to the person to whom you are giving it.

NAME	JOB/PROJECT	FEEDBACK



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