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25 days to delegation

Let it Go and Watch it Grow

A resource guide for effective delegation.

RescueDesk LLC
Virtual Assistant Services

INTRODUCTION

Small business owners often find themselves constantly hunting for two things – money and time. It doesn't matter if you're a solo entrepreneur, running a small retail shop, growing a professional services firm, or leading a team within a larger organization.

One of the keys to finding success in both time and money is learning how to delegate. So often professionals in leadership positions find themselves becoming a slave to the clock, not achieving everything they set out to do, or falling behind when it comes to moving their businesses forward.

Like any skill, delegation can be learned. With a little forethought, planning, insight, and self-awareness, handing over pieces of your to-do list will not only free you up to continue pushing your business to the next level, but can be the key to increasing your bottom line. Once you learn how to grow your team (either through hiring staff or outsourcing to a "virtual" team) and successfully delegate pieces of the business, you won't be chief cook and bottle washer. You'll be running a business that can get things done effectively and efficiently by trained experts who have a vested interest in getting things done.

Learning how to effectively delegate is vital in truly achieving success in business. In this resource guide, you'll be walked through assessing your needs, important considerations that need to be addressed when you're ready to delegate, how to test and measure the success of your efforts, and what you can expect to see from an efficient delegation plan.

Day 1 What does your day/week/month look like … really?

Most business owners are pulled in a hundred directions at any given moment, forcing you to bounce back and forth between mundane administrative tasks, putting out fires, or chasing the latest shiny object. But, forcing yourself to slow down and be fully conscious about where you're spending your time is key, and is the first step in successful delegation.

It's irrelevant if it's 30 seconds here, five minutes there, two hours doing this, or a full morning doing that. It's vital to know, exactly, where your time is going in order to streamline your day and get the help you need – when and where you need it.

What can be delegated?

- *Tasks closely related to the work people are already doing*
- *Tasks with clearly defined procedures and end results*
- *Repetitive tasks that fit into the normal work flow*
- *Tasks that enable employees/teammembers to develop themselves*
- *Routine and necessary tasks including detail work and info gathering*
- *Work where others are more qualified, such as proofing, research, and technical work.*

Bookkeeping
Data entry
Monthly newsletters
Recurring client-related maintenenance
Updating materials
Confirming scheduled appointments
Website updates
Social Media maintenance
Accounting tasks
General research
Recurring communications (email campaigns)
Marketing "lifecycle" tasks.
Administrative Tasks
Copywriting

Utilize a Web-based time-tracking tool, grab an old calendar, or simply put pen to paper. Keep track for at least a week; although, ideally, 2-4 weeks will show you a truer picture.

Day 2 What falls through the cracks?

Once you have a clearer picture about how you truly spend your days, now comes a tough part … recognizing what's falling through the cracks. Often, it's the small – but potentially impactful – items that get pushed to the back burner; basic tasks to keep your marketing lifecycle humming, developing and using a system to exceed your client's expectations, reviewing (and making decisions based upon) your monthly financial numbers, or researching the newest service or product you'd like to add to your company's repertoire.

The peaks and valleys are often especially prevalent for professional services firms. You're overwhelmed taking care of and maintaining your current client base, but all those simple -- but vital -- tasks needed to fill the pipeline and grow the firm get pushed aside.

Day 3 What do you hate doing?

As much as business owners and executives love what they do, there is always something that simply isn't a core competency or is, simply put, something they dread doing. If that's the case, then why are you doing it? If you're a big-picture thinker, excel at creative thinking, or are gifted in sales, then why are you doing the bookkeeping? Or if you're a whiz at organizational projects, love the challenge of digging into the details, or thrive on finding answers hidden in analytical data, then why do you struggle designing and coordinating content for an email campaign?

While you're tracking your time, highlight the items you enjoy and what you don't. Don't worry about *how* to get those items off your plate yet; just make note of what they are.

Day 4 What takes more time than it should?

When do you find yourself most frustrated? Do you get irritated that an email newsletter takes the better part of a week, when in reality it could probably be pulled together in a matter of hours? Are you spending more time dealing with payroll issues than coaching your employees? Does reconciling your financial statements at the end of the month mean a full day buried in Quickbooks?

You may need to use your instincts on this. When you start to catch yourself asking, "Why am I spending so much time on *(fill in the blank)* when I can be much more productive doing *(fill in the blank)*?"   then it's probably true that you're spending more time on those particular tasks than you should.

Day 5 Where *should* you be spending your time?

If you're a business owner, you should be spending your time strategically planning for the growth of your business and finding ways to achieve the goals you've set forth. If you're an executive or department manager, you probably should be thinking about ways to motivate your team and exceed the expectations of your company's customers.

In order to achieve success, you need to map out a clear picture about what you should be doing to get to the next level. Effective leadership requires having the ability to fully understand what needs doing and a vision for the future; it doesn't always require also doing the tasks it'll take to get it done. Those tasks can be left in the hands of the experts around you.

Day 6 Where do you *want* to be spending your time?

Just as important as knowing what you should be doing, you need to know what you *want* to be doing. You're in business because you're passionate about the service or product you provide. You're in business because you want complete control over your professional and financial future. You're in business because you want to play a role in improving the local economy by providing jobs.

No matter what your "why" is when it comes to why you're in business, you need to ask yourself some important questions. Do you want to be out selling your product or service, and not mired down in troubleshooting technology issues? Do you want to work less and play more, spending time with family or following your passions? Do you want to have a business that can practically run without you, so you can pursue other business opportunities? Do you want to be promoted, so you can take your leadership skills to the next level?

Knowing what you want is key in driving the plan that will get you to your goals, and what tasks and responsibilities you should be delegating to successfully get there.

Day 7 How much are you losing by not delegating?

Businesses sometimes need to spend money to make money, and delegating is no different. To give you an example, let's say a consultant charges $125 an hour for her expertise. For every hour she spends doing non-billable support tasks – keeping her financial books, managing her marketing lifecycle, general administration – that's an hour of not prospecting for new business or taking care of her current clients. That's time and money that she'll never get back. Ever.

Let's say that same consultant hires a $50/hour virtual assistant for 10 hours a month to make sure her email campaigns get developed and distributed and her calendar stays up-to-date. It'll cost her $500 a

WHAT IT'S COSTING YOU

$125/hour
x10 hrs/month
$315 per week on admin tasks
$1250 per month
$15,00 per year
on non-revenue-generating tasks!

HOW YOU CAN EARN

$50/hour for a virtual assistant
x10 hrs/month
$500 per month cost

$1250/month revenue
- $500 virtual assistant fee
$750 revenue potential/month
$9000 revenue potential/year

month. But, with her newfound extra time, she picks up a new, 10-hour-per-month client at her usual $125/hour rate. After paying her virtual assistant, she's enjoying an $750 profit at the end of the month **... or $9000 profit in a year!)**.

That's $9000 that **she never would have seen had she not delegated.**

In addition to the financial benefits, there's significant value in delegating to an expert. If bookkeeping isn't our consultant's strength, she can be confident knowing that her finances are being managed by a true expert. At tax time, the consultant is happy, her accountant is happy, the IRS is happy, and she now has access to detailed – and accurate – data that will play a major role in her decision-making.

Day 8 What does capacity look like?

Look at where you're spending time, and look at where your team is spending its time. What do you see? Overtime? Long hours? Missed deadlines? Overlooked opportunities? Internal strategic projects that never make it to completion?

The general rule of thumb for professional services is if you're spending more than 70-75% of your time on straight billable work, you're running ragged. On paper, it may not seem like 75% billable time would be a problem, but you have to factor in distractions (phone calls, emails, etc.), administrative work, strategizing, planning, prospecting, and everything else it takes to run your business … heck, even the "transition" between projects in any given day takes a little time.

Crunch the numbers (billable vs administrative, supply vs demand, projected revenue vs cash flow) and figure out what capacity looks like and, more importantly, know what *over*-capacity looks like.

Day 9 What's your core competency?

You are where you are today because your strengths brought you here. You're an executive coach because you excel at helping people achieve success. You're an accountant because you understand the story that numbers can tell you. You're a professional speaker because you have a gift for motivating and inspiring action.

You may also have developed an interest (and the matching skillset) in effectively marketing your business, or you've found that building a business strategy that aligns with your mission and vision is one of the most enjoyable things you do.

But, successful professionals recognize that they simply can't (or don't want to!) excel in all the areas it takes to run or manage a business. Not everyone has fully developed sales skills, or the eye for financial details, or the natural ability to build processes and systems that automate your plans.

Understanding your core competencies – and knowing what isn't a strength – is an important step in recognizing what needs to be delegated. More specifically, what needs to be delegated to someone with the experience and drive that you lack in that particular area.

Day 10 Can you do it alone?

You've reviewed your core competencies, and you've recognized your challenges. Without filling in the gaps that fall in between your areas of expertise, can you truly get to where you want to be professionally? Chances are, probably not. Unless you're an attorney, you probably can't defend yourself in court successfully. It's no different for some of the other tasks on your to-do list.

If you're not especially adept at accounting, why are you spending hours every month doing your bookkeeping? If you're not a visual artist, why are you struggling getting your e-mail newsletters designed and written every month? Delegating these things to an expert will make it that much easier to reach your goals.

Day 11 What are your short- and long-term goals?

Ask yourself this: How do you have to act today to have what you want in five years? If, in five years, you'd like to be spending more time on overall strategy and less on client work, what do you need to have in place *now* to get there? If you'd like to be spending less time in the office and more time travelling the world, what experts do you need to have on your team so

PLANNING RESOURCE

Mindmapping is an effective tool for "visual learners" when it comes to mapping out goals and strategies for the future.

A mindmap begins with a single goal or idea in the center, then branches off with thoughts, theories, and strategies to reach your goals.

they can competently and successfully keep moving the ball forward?

Take some time to map out your goals for the future – break it down by month, by quarter, by year and by 5 years. The longer you put off what you need to do *today* to get where you want to go *tomorrow*, the longer it'll take you to get there. It's that simple.

Day 12 What would your dream team look like?

Align your short- and long-term goals with the ideal team to accomplish those goals. However, dig deeper than titles and job descriptions. What are these people like? What are their work styles? What are their professional backgrounds? Remember, these people don't need to be employees – they can be freelancers, professional service providers and vendors. What soft skills do they bring to the table that will mesh well with you and your business culture? What do they value in their work and their lives?

Writing position descriptions is essential, but it's also tactical. Consider the culture you are trying to build with your business because, oftentimes, your culture shines through as the "personality" that the rest of the world (i.e., your customers!) will see. Those you delegate to will potentially be representing you and your business, so their skills and values need to align with yours.

Day 13 How would you measure success?

In order to have a truly effective and successful delegation plan, you need to be able to test and measure your efforts. The same way a good marketing plan incorporates testing and measuring the reach of your message and customer conversion, delegation plans should include testing and measuring your time and company growth.

Sure, you could add a virtual-assistant firm to your team, but you need to have some basic metrics in place to gauge how your own capacity changes as a result. If you're using the time to prospect for new business, measure what that means in increased revenues and profits.

Let it Go and Watch it Grow

Delegation is one of the primary ways business owners grow their business, but having the ability to recognize what's working (and what's not) in the delegation process is important.

Start with a few basic metrics, such as if you were to delegate your bookkeeping to a bookkeeper or managing your client database to a virtual assistant. How long do those tasks take you to do on your own, and determine how that time would be spent if you weren't doing those things. If it takes you five hours to manage your monthly finances, what would getting that five hours back mean in terms of sales?

The reverse is also true. If you've been intending to distribute a monthly email campaign or keep a weekly eye on the local networking events, but haven't done so because of time and project constraints, what would it mean if someone else took over that task for you?

Day 14 Needs assessment

If you look at your daily, weekly or monthly task list and all you feel is overwhelmed, don't fret. Rome wasn't built in a day, and there's no rule that says you need to develop a fully scalable, fully systemized, fully integrated delegation plan in a day. Start small; start with the top three of four things that you'd love to get off your plate and would have the most impact. This could be things you simply hate doing, things that are important but you realize aren't the best use of your time, or things that have been put off because you simply don't know how or where to start.

Assessing your needs starts with this simple step. Yes, you most likely have dozens of items (if not more) that other professionals or added staff could handle for you, but if delegating is somewhat of a daunting process, walk before you run. Simply start with the top few things, and map out what it would mean to your time, your budget and your revenues if you could spend your time doing more revenue-generating or strategizing. A few key questions to help get you started:

- ◆ Is it a recurring task?
- ◆ Can it be automated?

- ◆ Can a process or system be developed behind it?
- ◆ Do you have the skillset to do it expertly?
- ◆ Can you train someone to do it?

Day 15 ## What, exactly, do you need?

Go back to the lists you've created of your highest priority tasks that you'd delegate if you could. Take that list a step further and break it down into more itemized to-do list items. This will help you determine if you can delegate to one person (which is often the case) or if you need to pull in a team of people to get it off your plate, which is sometimes required.

For example, let's say the top three things that you'd like to delegate include getting your e-mail newsletter pulled together every month, getting a new Website built (and subsequently maintained with regular content updates), and your monthly bookkeeping. Itemize the things you currently do to get that newsletter published, your finances reconciled, and your ideas for a new and improved Website. Take those lists and use them to talk to outside service providers or incorporate some of the skills required when writing a job description.

Day 16 ## When do you need to delegate?

Do you need some support in your business every day? Every week? Every month? Maybe just a few times a year when you have a busy business cycle? Having a solid sense about *when* you would most benefit from having someone to delegate some of the support responsibilities is an important step, especially if you've been used to doing it all on your own until now. It ties directly in with knowing what you need help with; knowing when you typically need help will also be a guiding factor in how to effectively delegate to someone else.

Day 17 ## Where can you get that help?

You can delegate your task list to just about anyone – it simply boils down to what needs doing and when it needs to get done.

One route is to, of course, hire employees. A general manager can coordinate the day-to-day operations of your business. A sales person will focus on business development and retention. Support staff can tackle individual projects and customer service areas. Hiring staff is

an investment and requires budgeting both time and money (training, tools, equipment, resources, etc.), but it also directly ties in with the long-term goals you have for your business. If you pictured having an in-house staff of 10 people in 5 years, the time to start bringing those people in is now.

An alternative to hiring employees -- which is especially attractive to budget-conscious small business owners -- is to contract with a professional service firm to get the help you need. Thanks to innovative and intuitive technologies in project management and communication, building a "virtual team" is a snap. These specialized professional services – bookkeepers, virtual assistants and administrative consultants, copywriters, consultants, virtual "business managers" – are highly specialized in their areas of expertise. You get the benefit of truly expert help without the added costs of employees. In addition, they're very well-schooled in teaching their clients how to delegate, so they can provide great insight into the best way to hand over part of your to-do list.

Day 18 How do you budget for growth?

There's no way around it. Sometimes you need to spend money to make money. It's a tough balancing act for most business owners, especially those who have bootstrapped their way to success. But, investing in the growth of your business is often necessary if you're going to reach your goals. But, you can budget for growth. We'll break down some of the basic budgeting considerations for the two primary types of people you could delegate parts of your task list to – hiring staff and outsourcing.

Employees	**Costs:** Part-time vs Full-time, taxes, benefits, space, equipment, training time, vacation time, unproductive time
	Benefits: On-site support for special projects or "emergency" tasks, potential long-term teambuilding, customer service, growing the local job market
Outsourcing	**Costs:** Hourly rates and/or service fees, adjusting business processes to outsource, time to find reputable firms and service providers
	Benefits: They're experts in their field, no added "employee" costs, specialized services done quickly and expertly on your behalf, help teach clients "how" to delegate, highly motivated and goal-oriented (as their success depends on your success)

Progressive Delegation Skills

www.businessballs.com/delegation.htm

"Do exactly what I say"
This is instruction. There is no delegated freedom.

"Look into this and tell me the situation, and we'll decide together."
This level of delegation encourages and enables the analysis and decision to be a shared process, which can be helpful in coaching and development.

"Give me your analysis of the situation and recommendation. I'll decide if you can go ahead. "
Asks for analysis and recommendations, but you will check the thinking before deciding.

"Decide and let me know your decision, then go ahead unless I say not to."
The person you've delegated to controls the action. The increase in responsibility saves time. This can also be used very effectively when seeking responsibility from above or elsewhere in an organisation, especially one which is strangled by indecision and bureaucracy.

"Decide and take action. You need not check back with me. "
The most freedom that you can give to another person when you still need to retain responsibility for the activity. A high level of confidence is necessary, and you would normally assess the quality of the activity after the event according to overall results.

"Decide where action needs to be taken and manage the situation accordingly. It's your area of responsibility now."
The most freedom that you can give to the other person, and not generally used without formal change of a person's job role. It's the delegation of a strategic responsibility. This gives the other person responsibility for defining what changes projects, tasks, analysis and decisions are necessary for the management of a particular area of responsibility,

Additional Resource:
www.mindtools.com/pages/article/
newTMM_60.htm

Day 19 What's your work style? (Personality vs skills)

Just as important as the tactical task of deciding what to delegate, when to delegate, and how to delegate is having enough self-awareness to know how you work, and with whom you work best. You can pretty easily find someone with the right skill set, but their skills will be completely worthless if you can't effectively communicate or personality clashes keep you from truly collaborating. So, whether you are hiring staff to delegate to or outsourcing to a professional services firm, know your – and their – personality and work style.

Day 20 What are your delegation skills?

Be honest. Rate yourself on a scale from 1-10 on how well you think you'll be able to delegate. If you're a micromanager who insists that the people around you "wait to be told" or to "follow these instructions exactly," that's not delegating. That's giving instruction. True delegation is a balance between providing guidance and giving responsibility for completing the task or project to the expert doing it.

While it takes time and trust, it also means implementing processes and systems to track productivity and progress. When several pieces of a business are delegated -- whether to staff or outside services -- dependencies are put into place as "checks and balances" on any project.

Day 21 Can you change your ways?

Having the ability to adapt and grow and change your business processes is the key to successful delegation. But, this is one of the most difficult things to do, especially for owners of small and relatively "young" businesses. You've been used to doing it all yourself, or perhaps with the help of another person (or maybe two). But, in order to see the effectiveness of truly delegating, you may need to change how you run your business. Letting go of control of some of the details doesn't mean letting go of the business. In fact, it frees you up to have even more control over the growth of your company if you designate some of the support tasks to another expert. Think about what habits and behaviors you'll need to change in order to truly use delegation to its full potential.

Day 22 How messy is your current system?

Oftentimes, the "system" of getting things done is locked away securely in the business owner's brain. It includes doing things when they need doing, putting out fires when they need putting out, and accomplishing tasks as deadlines loom near. But, that won't work when you're looking to hand over some of your business tasks to someone else. Building processes and systems to track productivity, progress and investment needs to be considered when putting together a delegation plan. The first step is looking at your current systems and seeing where you need to "clean house."

Keep in mind that if you choose to outsource to a service provider, they can typically help with this process. They generally have extensive experience helping clients just like you learn how to streamline and put processes and calendars in place.

Day 23: What technology and tools will you need?

In today's Web-based world, there are countless tools available to track, test and measure the projects on your to-do list. Project management tools, online work journals, cloud-based databases, and Web-based versions of your own software will help in building the processes and systems you need to get things off your plate without losing control of "the big picture."

Project Management and Time Tracking

There are several Web-based tools available to track projects and your time. Here are a few from our experience that are worth considering.

Project Management

◆ Basecamp
◆ Zoho
◆ Teamwork
◆ Google Apps
◆ Huddle.com

Time Tracking

◆ MyHours
◆ SlimTimer
◆ Toggle
◆ RescueTime
◆ Quickbooks (and other accounting software)

Day 24: Delegate outcomes, not just tasks

You've grown your team and you're ready to hand over some of the responsibilities of your business to another expert. When it comes to delegating, it's often most effective to delegate the outcome ("Please put together an email newsletter that includes a call to action") and not just tasks ("Please create a header. Please edit the copy. Please format this image. Please upload the distribution list.)

Presumably, you've brought on an expert to handle the tasks you'd like to delegate. By explaining the outcome of a project in the context of the overall goal you're trying to achieve, the person you're delegating to can look at the task from several angles. This often increases the chances for innovative ideas and solutions that you may not have originally considered.

Day 25: Enjoy the benefits

By building processes and systems, and understanding what it truly means to be an effective delegator, you should enjoy more time to do what you want (and should) be doing to grow your business or run your department. You are providing opportunities to experts in their fields to contribute to your success, and you are reaping the benefits that come with achieving both your personal and professional goals.

About the Author

Rachel Rasmussen is owner and founder of Rescue Desk Virtual Assistant Services. She and her team have been helping small business owners delegate pieces of their to-do lists since early 2008. They focus heavily on providing support in the areas of marketing, communications and executive-level administrative tasks. Additionally, Rasmussen has given presentations on effective delegation, relying on her experience and expertise in coaching her clients on learning to develop systems and processes to confidently delegate in order to see business growth.

Rachel has been interviewed for different industry publications and local business news outlets on the virtual assistant industry and its growing impact as a solution for small business owners. She is an active member of several business groups in her hometown of Madison, Wisconsin including The Business Forum, the Greater Madison Chamber of Commerce, the Middleton Chamber of Commerce, the Small Business Advisory Council for the City of Madison, and others. She was nominated for the ATHENA Young Professional Award in 2009 and was one of *In Business Magazine*'s "40 Under 40" in 2010.

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