

THE ONE PAGE Delegation Plan Worksheet

Step 1 NAME INNER RESISTANCE TO DELEGATING

Circle the words which describe your white knuckled clutch on your work.

On my worst day, I am:

Perfectionistic Bossy High-strung Afraid to be creative Short-Tempered
Possessive Insecure A Poor Listener Co-dependant Territorial Frantic
Competitive Inflexible Impatient Controlling Antsy Impetuous
Afraid Distrustful Not Confident

1. First acknowledge that you have an inner resistance.
2. Reframe. Come up with a better way to think about delegating.
3. Write down what the payoff will be if you delegate.

1.
2.
3.



Blog Bonus! Read more about [Delegation Resistance](#).

Step 2 RED LIGHT

Red Light tasks are those that don't use your skill set to the fullest. Instead focus on your HABUT (Highest And Best Use of Time). These are tasks that are:

- Below your pay grade or potential
- Teachable
- Things that can really be done by someone else if trained

Write down 3 delegatable activities that are Red Light tasks.

1.
2.
3.



Blog Bonus! Read more about [HABUT](#).

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Step 3 PRIORITIZE

What delegatable (RED Light) tasks would free up the most time? Which are the best ROI? These will likely take more time.

- 1.
- 2.

Conversely, what smaller tasks can I delegate for some quick wins?

- 1.
- 2.

Step 4 RECRUIT OR OUTSOURCE

Traits: Write down the traits needed in the person you are looking for. For example, outgoing, comfortable on the phone, persistence, etc.

Compensation: How much will you pay them?

How will they be measured: What are they expected to actually accomplish? What are their kpis (key performance indicators)?

Choose an existing competent employee to train. Or recruit and hire a new employee.

Potential internal employees for tasks listed above:

- 1.
- 2.
- 3.



Blog Bonus! Read more about [The Employee Path of Ascension](#).

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Or **Outsource:** Research outsource companies.

Who will research? _____

Step 5 TRAINING PLAN

Simplify the task. Organize an outline to streamline delegation. Include a checklist.

Describe the Art of task (the thinking behind the task) as well as the Science (how to do the task).

Make a milestone calendar:

By what date will I decide on the tasks to delegate _____

By what date will I:

Simplify the tasks _____

Organize an outline _____

Create a checklist _____

Describe the Art of the Task _____

Select an employee _____ or begin recruiting _____

By what date will I begin training _____

Tips:

1. **Talk & Transcribe:** If you can talk, you can train. To prepare ahead, dictate the job processes to a transcription service. The transcription becomes a document that you edit or have someone else fix up.
2. **Assign to the Trainee:** Require the trainee to document what you're teaching him as you train him. Enhance your operations manual or checklist for this trainee or the next new hire.
3. **Outsource:** Work with a coach or consultant. Hire someone to move the process along.



Blog Bonus! Read more about [Training and Outsourcing](#).

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Step 6 CREATE A FEEDBACK LOOP

1. Set up a chart listing job expectations. Chart:

2. Create a shared document or process feedback from trainer to trainee.
Where will this information be stored?

3. Set regular intervals to review feedback together. How often will we review
the feedback?

4. How could the training process improve?



Blog Bonus! Read more about [Feedback Loops](#).

If you're like most people, you're thinking "sounds good, I'll do this someday." And if you're really like most people, you won't.

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