Delegate to Elevate
Get More by Doing Less

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DISCLOSURES

Understand What Delegation IS and IS NOT | Know When to Delegate | Know Who to Delegate To | Know How To Delegate | Know How to Keep Accountability

Objectives for Today
Base Camp

Understand What Delegation IS and IS NOT

Know When to Delegate

Know Who to Delegate To

Know How To Delegate

Know How to Keep Accountability

First things first: Who were you?

First things first: Who were you?

DREAMER
ENTREPRENUER
LEADER
DIFFERENCE MAKER
CHIEF EXECUTIVE OFFICER

WHO YOU BECAME

Firefighter
Therapist
Bathroom Attendant
CEO-

WHO YOU BECAME

Firefighter
Therapist
Bathroom Attendant
CEO-

WHO YOU BECAME

Firefighter
Therapist
Bathroom Attendant
CEO-
Chief Everything Officer

The Key to Freedom

The Key to Becoming

The Key to Becoming

A business owner

The Key to Becoming

A business owner

Chief Executive Officer

The Key to Becoming

A business owner

Chief Executive Officer

High Performer

The Key to Becoming

A business owner

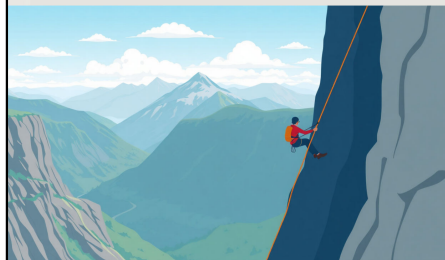Chief Executive Officer

High Performer

FREE

The Key to Becoming

A business owner

Chief Executive Officer

High Performer

FREE

What Delegation IS

What Delegation IS

What Delegation IS

The Rope Analogy

The Rope Analogy

What Delegation Is NOT

Delegation IS NOT
A Blind Handoff

Delegation IS
A well thought out, step by step process

Delegation IS
A series of things

Delegation IS NOT
Micromanagement

Holding the Rope Too Tight

Your Job as a Leader

Delegation IS NOT
Abdication

Delegation IS NOT

A Blind Handoff

Delegation IS NOT

A Blind Handoff

Crossing your fingers and hoping for the best is not a strategy

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Delegation IS NOT

Micromanagement

Delegation IS NOT

Micromanagement

Micromanagement reflects a lack of trust. Results in overbearing control. It stifles creativity and accountability. It ultimately leads to burnout and resentment.

Delegation IS NOT

Abdication

Delegation IS NOT

Abdication

Abdication entails letting go of responsibilities entirely. This leads to disarray within a team. Lack of guidance results in confusion and diminished performance.

Delegation IS

A well thought out, step-by-step process

Delegation IS

A matter of 2 things:

Delegation IS

A matter of 2 things:

1. Training-More rope/Less Rope

Delegation IS

A matter of 2 things:
1. Training-More rope/Less Rope
2. Readiness

Delegation IS

A matter of 2 things:
1. Training-More rope/Less Rope
2. Readiness -Maturity

Holding the Rope Too Tight

Holding the rope too tight symbolizes fear-based control, where leaders maintain an overly restrictive grip on tasks. This approach can lead to distrust and anxiety among team members, crippling their growth.

Your Job as a Leader

Your Job as a Leader

1. Quality Control

Your Job as a Leader

1. Quality Control
2. Know When to Lengthen or Shorten the Rope

Good Reasons to Delegate

Good Reasons to Delegate

1. Grow your Business
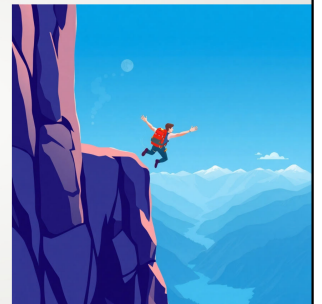

Good Reasons to Delegate

1. Grow your Business
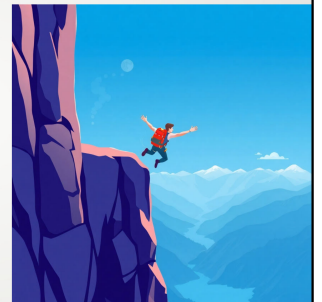2. Create Opportunity

Bad Reasons to Delegate

Bad Reasons to Delegate

1. Desperation

Bad Reasons to Delegate

1. Desperation
2. Exhaustion/Burnout

Slide 1

Why We Don't Delegate

Fear of letting go

Wrong Hires

Poor training

1 YEAR

Slide 2

Fear of letting go

Slide 3

Wrong Hires

Slide 4

Hiring Tips

Slide 5

Hiring Tips

-Eagles not Chickens

Slide 6

Hiring Tips

-Eagles not Chickens

-Compensate Above Average

Hiring Tips

-Eagles not Chickens

-Compensate Above Average

-Create Unity by Culture

Hiring Tips

-Eagles not Chickens

-Compensate Above Average

-Create Unity by Culture

-Celebrate Wins

Poor training

1 YEAR

1 YEAR

1 YEAR

1. Training schedule in place
2. Regular meetings/check-ins
3. Expectations are set and reminders in place

When to Delegate: Readiness Test

When to Delegate: Readiness Test

How Do I Know it's Time?
How Do I Identify the Right Teamember?
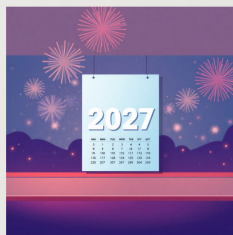

When to Delegate: Readiness Test

When to Delegate: Readiness Test

2 Critical Qualities

When to Delegate: Readiness Test

2 Critical Qualities

Integrity

When to Delegate: Readiness Test

2 Critical Qualities

Integrity

Whole
Consistent
Mature

When to Delegate: Readiness Test

2 Critical Qualities

Integrity

Whole
Consistent
Mature

Competentancy

Slide 1

When to Delegate: Readiness Test

2 Critical Qualities

Integrity
Whole
Consistent
Mature

Competentancy
Knowledge
Skill

Slide 2

INTEGRITY

Integer: noun: integer; plural noun: integers

1. a number that is not a fraction; a whole number.

2. a thing complete in itself.

Slide 3

INTEGRITY

Integer: noun: integer; plural noun: integers

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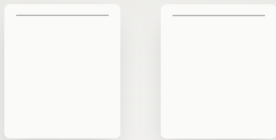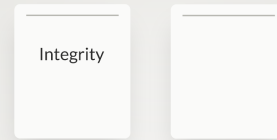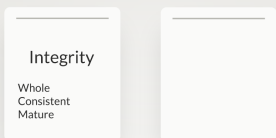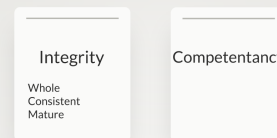2. a thing complete in itself.

Is this person consistent...

Slide 4

INTEGRITY

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Is this person consistent...

in and out of the office

Slide 5

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Is this person consistent...

in and out of the office

in behavior and actions

Slide 6

INTEGRITY

Integer: noun: integer; plural noun: integers

1. a number that is not a fraction; a whole number.

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Is this person consistent...

in and out of the office   in who they are

in behavior and actions

Slide 1
Competent

...in the job they were hired for

Slide 2
Competent

...in the job they were hired for

Soft Skills

Slide 3
Competent

...in the job they were hired for

Soft Skills

Slide 4
Competent

...in the job they were hired for

Soft Skills

Humble

Slide 5
Competent

...in the job they were hired for

Soft Skills

Humble
Hungry

Slide 6
Competent

...in the job they were hired for

Soft Skills

Humble
Hungry
Smart

HOW to DELEGATE

Step 1: Audit Your Time

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Write down everything you do in a day, week, month, year.

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Categorize them 1-4

1-Important: work you love and are good at

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3-Waste of time: you're bad at it, but like it

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Categorize them 1-4

1-Important: work you love and are good at

2-Less Important: work you're good at but don't love

3-Waste of time: you're bad at it, but like it

4-Hate it: you're bad at it, and hate doing it

👉 **Offload 3s and 4s**

Waste of time	Hate it

Step 2: Define the Win

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Establish clear goals for the delegated tasks by using the WON Pager method. This includes a one-sentence role summary, measurable KPIs, a definition of success, and key actions to achieve desired outcomes.

Step 2: Defi...

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Step 3: Identify the Right Person

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Carefully select the individual who will take on the delegated tasks. Assess their skill sets, growth potential, and current workload to ensure they are the right fit for the responsibilities at hand.

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Answer these questions:
1. What are their skillsets?

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Answer these questions:
1. What are their skillsets?
2. What are they good at?
3. What is their current workload?

Wrong People?
Back to hiring

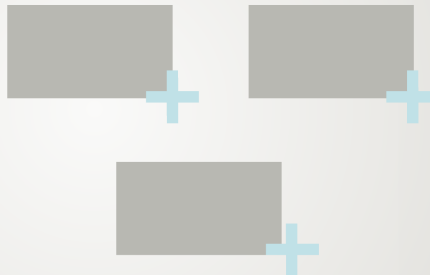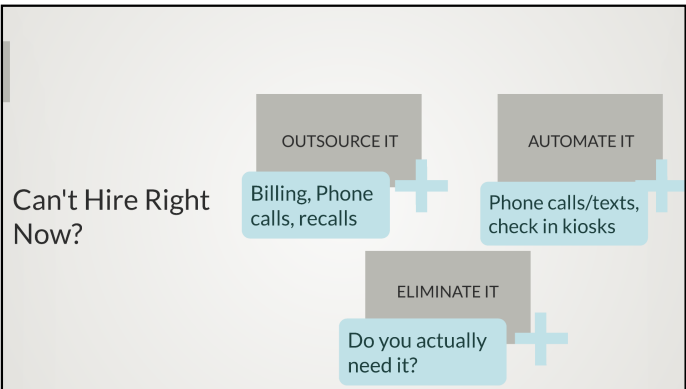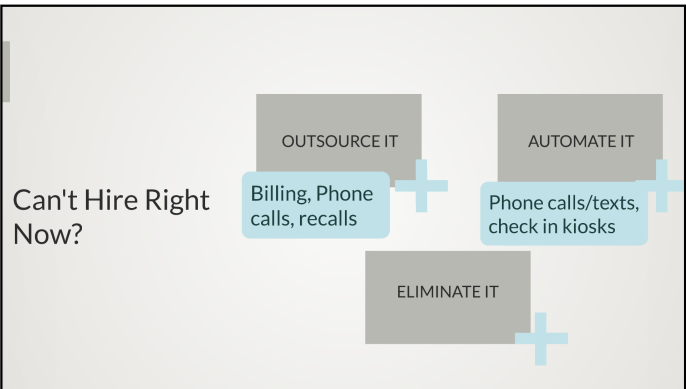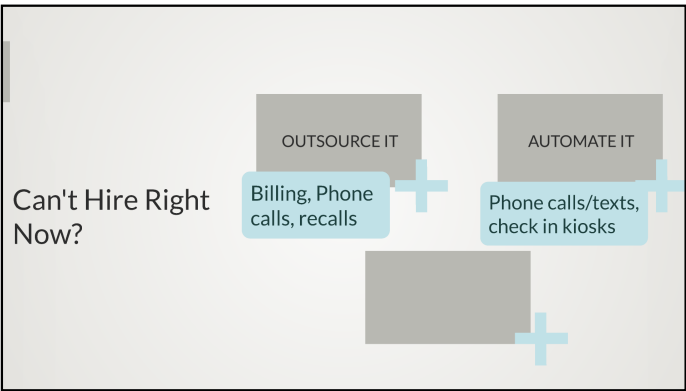Back to hiring

Can't Hire Right Now?

Can't Hire Right Now?

OUTSOURCE IT

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OUTSOURCE IT
Billing, Phone calls, recalls

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OUTSOURCE IT
Billing, Phone calls, recalls

AUTOMATE IT

Can't Hire Right Now?

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Billing, Phone calls, recalls

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Phone calls/texts, check in kiosks

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Do you actually need it?

Slide 1

Can't Hire Right Now?

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ELIMINATE IT
Do you actually need it?

Slide 2

Can't Hire Right Now?

OUTSOURCE IT
Billing, Phone calls, recalls

AUTOMATE IT
Phone calls/texts, check in kiosks

ELIMINATE IT
Do you actually need it?

Slide 3

Step 4: Train, Trian, Train!

Implement a structured training regimen consisting of three levels of engagement.

Slide 4

Implement a structured training regimen consisting of three levels of engagement.

Slide 5

Slide 6

Implement a structured training regimen consisting of three levels of engagement.

Implement a structured training regimen consisting of three levels of engagement.

3 LEVELS OF ROPE

Implement a structured training regimen consisting of three levels of engagement.

3 LEVELS OF ROPE

1. I do. You Watch

Implement a structured training regimen consisting of three levels of engagement.
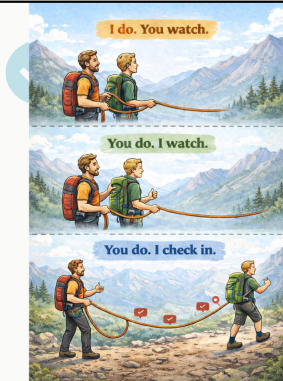
3 LEVELS OF ROPE

1. I do. You Watch
2. You do. I Watch

Implement a structured training regimen consisting of three levels of engagement.

3 LEVELS OF ROPE

1. I do. You Watch
2. You do. I Watch
3. You do. I Check-in

Implement a structured training regimen consisting of three levels of engagement.

3 LEVELS OF ROPE

1. I do. You Watch
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Accountability and Authority

Accountability and Authority

Maintaining accountability is crucial to ensure that responsibilities are met and that the team remains aligned with their goals. Regular reviews and retraining are essential to adapt to changing circumstances and to reinforce standards, ensuring that authority is appropriately matched with responsibility.

Accomplished by

Accomplished by

1. Reviews

Accomplished by

1. Reviews
2. Revisiting Goals

Accomplished by

1. Reviews
2. Revisiting Goals
3. Retraining

Accomplished by

1. Reviews
2. Revisiting Goals
3. Retraining
4. Reinforcing standards

Accomplished by

1. Reviews
2. Revisiting Goals
3. Retraining
4. Reinforcing standards

You didn't build your practice to carry every rope yourself. Delegation is leadership focus.

IN CLOSING

Delegation allows you to:

IN CLOSING

Delegation allows you to:

Move from CEO to CEO

IN CLOSING

Delegation allows you to:

- Move from CEO to CEO
- Create Margin

IN CLOSING

Delegation allows you to:

- Move from CEO to CEO
- Create Margin
- Prevent Burnout

IN CLOSING

Delegation allows you to:

- Move from CEO to CEO
- Create Margin
- Prevent Burnout
- Grow and Expand

IN CLOSING

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Delegation allows you to:

IN CLOSING

THANK YOU!

THANK YOU!

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