

DIGITAL DELEGATION ACTIVITY WORKSHEET

Digital Delegation is the key to success as a small business owner, but it can also be extremely challenging if you don't know where to start, or what to delegate! We created our **Digital Delegation Activity & Worksheet** to help you start the process in just *three* easy steps; Creating a Task List, Categorizing Tasks, and then Task Analysis & Delegation.

1 CREATING YOUR TASK LIST

In order to know which tasks are most relevant, you will need to begin task monitoring. We recommend a monthly task monitoring routine (as we believe it is the most effective), but you can also conduct daily, weekly and even *annual* task monitoring routines.

Task monitoring is as simple as documenting each individual task you are involved in within the given time frame (whether it was completed or not), as well as the amount of time you spent on the task.

Here's a few examples using a snippet from our **Simple Task Monitoring Chart** :

DATE	TASK	TIME TAKEN
MON March 2	Responding to customer message on Facebook	2 min
MON March 2	Adding new clients to MailChimp email audience	4 min
TUE March 3	Research payment processors	27 min

We have included a few blank Task Monitoring pages at the end of this workbook for your convenience. Once you have the task monitoring chart completed, we can move on to Step 2!

2 CATEGORIZING TASKS

We are going to begin charting the tasks you collected from Step 1. In the pages below, you'll find a **Task Optimization Chart**. Begin to add each task into the appropriate quadrant. If you get stuck on a task, please ask yourself the following:

1. Do you feel confident in your ability to produce high quality work or results in this task?
2. Do you have any prior education or training that is relevant to this task?

3. Do you have any prior experience completing this task?
4. How do you feel before / after working on this task? Is it a positive or negative feeling?
5. Do you get any personal enjoyment from completing this task?
6. Could this task be done better by someone else?
7. Why do **you** need to be working on this task?

3 TASK ANALYSIS & DELEGATION

Let's summarize the amount of hours in a week you currently work / need to perform tasks, and compare it to a sustainable number of working hours to maintain a healthy work/life balance. How far off are you?

CURRENT	SUSTAINABLE	IDEAL
	40	30

The difference between your current tally and the numbers above, will be the amount of hours you need to ensure you are Digitally Delegating.

$$\text{Current} - \text{Sustainable} = \# \text{ of Hours to } \textit{Digitally Delegate}$$

1. We start by delegating tasks in the **weakness** category. Hiring someone (whether it be an employee or contractor) with a skillset that aligns with the task in question will be much more beneficial for your business. By trusting their expertise, these tasks will be completed much more effectively.
2. Next it's time to get rid of things you **don't like!** It is an injustice to yourself to continue to perform tasks that you don't like. You will be happier and much more productive when you are doing tasks you are passionate about, and the quality of your work will shine through and attract more business.

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- 3. Just because you are good at something, doesn't mean you enjoy it! If your strength does not align with your passion, you should consider delegating this task. Your business most likely directly benefits from performing these tasks, so depending on the situation – you might not be able to let them go. However, it's important to know that *growth* happens when you teach and empower your team to perform these tasks at the same level your customers have come to expect from you.
- 4. And lastly, it's important to know when you should delegate a task that you ***actually like***. When you find yourself exceeding a sustainable work schedule, (30 – 40 hours a week) it's time to start delegating the tasks you enjoy. It's not easy to delegate these tasks, but it is possible and will be necessary to scale up your business.

You'll need to know ***who*** you can *Digitally Delegate* to and how much work (hours) you will have available for them.

WHO	TASK	TIME TAKEN

And there you have it! You have now begun the *Digital Delegation* process, and are well on your way to achieving a healthier and more sustainable work/life balance.

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Simple Task Monitoring Chart

DATE	TASK	TIME TAKEN

<p>STRENGTHS</p>	<p>WEAKNESSES</p>
<p>LIKES</p>	<p>DISLIKES</p>

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