

The hardest part most of my clients struggle with when we talk about delegating tasks to somebody else is really where did they start? How do you even decide what you're gonna hand off to somebody else? What you're gonna keep for yourself? And maybe what do you need to hire out for? So today we're gonna talk about that.

Welcome to the short of it with Amanda Long. Okay. So if you're ready to outsource, but you're not really sure where to. We're gonna talk about that today, and it really is a hard part of delegating is just getting started. I mean, half the battle of most things we do is the getting started part, so I'm gonna help you with that.

Today we're gonna talk about where to start. This episode might be a little bit longer than others, but it's definitely going to be worth it. Let's start with the first step. So the very first thing that I recommend any of my clients or my friends who are asking about how to delegate things, the first thing is really to just keep track of what you're doing on a daily basis.

I would take a full week, but if you only have a few days, or if you are really antsy to get things started, I would take at least three days. I wouldn't do any less than that. I think that gives you a really good idea of what you're working. And use this time to just document all the things that you're doing.

So if you take out your planner in the full focus planner, which I, you know, I love, I have a whole notes page, and so on that notes page, what I would do is I would just start tracking and taking note of all the things I do in a day. So you are using your planner to document or to track your daily top three, and you are probably working through stuff, but there's things that come up throughout the day that we always forget about, and that's why I say you should document it for about a week.

Because those unexpected things, you can start to see if there's a pattern. So I always recommend take out your planner or a notebook. I mean, if you don't have a planner, use a notebook or something. Just keep something that's really easy to be close to you nearby all day, even if it's a, a note on your iPad.

But keep that next to you so that every time you do something, you just jot a little note of what it was that you. You know, start writing down everything that you're doing in a day. So it doesn't matter if it's checking emails five times a day, I want you to document if you're writing a blog post or if you're adding new products to your inventory.

If you're working on bookkeeping, if you're checking your business email, if you're checking your social. In boxes or just to see if people are commenting. That's called social listening. No matter how small or big it is. Write it down just to make sure that you're capturing all those activities that you're doing.

Now, the next step is to take those things, those activities that you've been doing all week, and then to start asking yourself some questions. Like what is your specialty? What's that one thing in your business that you love to do? And I call that your zone of genius. If you read the Big Leap book, which I love, you'll be very familiar with the Zone of Genius.

That term. It's just where do you shine? Where do you do your best work? Like what is the best use of your time. So start looking through that list and highlighting those things that you think you really love to do and you're good at. And then you want to ask, what do you like to do best? What are the things that you don't like to do?

What things take you so much time and you just would love to have them off your plate? Or what are some tasks that you're not good at that maybe. You might like, but it's probably better somebody else is doing. And then start identifying what processes you already have documented, because that's going to be something that's really easy to get off your plate.

If the process is already documented, spelled out, it's a real easy to hand off to somebody. That's probably gonna be one of the top things that you're gonna want to hand off to somebody else as long as it's not something that's in your zone of genius. So next you want to assess the things that are going to go off of your plate first.

And those are gonna be the things that we asked ourselves when we asked ourselves. We went, Ugh, I don't want to do that. Or, that takes me so much time, or I'm not very good at it. And the other thing is gonna be the processes that you already have documented. So those are the three things that you're probably gonna want to start with, and you're probably gonna want to put them in an.

Of things that you want to get off your plate first. So after those first, that first week or the first few days of documenting all of your tasks and then asking yourself that question, you want to start sorting the tasks and putting them in some type of order. So whether that's going through the list that you made over the last week, and you're gonna highlight certain things, a particular color for the items that you're gonna keep, or you're gonna create another document.

Maybe that has columns of things that you're going to outsource and things that you're going to keep, then you kind of wanna organize what's gonna go first. Like the things that you have processes for. Those things that you don't like to do that are not in your zone of genius, that are taking you a lot of time that you have a documented process for, that's gonna be number one on your list, because that's gonna be the low hanging fruit, those items.

Are easy to offload to somebody else because now you don't have to go back through and create the process. It's done for you. You can easily walk them through the process and hand it off to them. So I start with that list and I get a good idea of where I wanna start. Now you can't hand everything off all at once.

It's just not possible. But I keep a list in Asana of the items that I want to start outsourcing. This helps me kind of keep track of where I'm at and what maybe the next process in my business might be that I need to start creating. So in my Asana company Guidebook, I have a whole project board on my company Guidebook.

And these are things that I need to help run my business and I share it with my team, so, which I've talked about before in a. Video that I created on how I organize my business in Asana, and I will definitely do a podcast on that as well. Or I'll have a link to that blog post in the show notes for you in case you are interested in how I organize my business in Asana.

But don't feel bad if you feel like your outsourcing list is five miles long, because you have to just keep track of everything that's on your mind that you might wanna hand off. And eventually, one day your team will be big enough to handle these things for you. And if you have a list that's already existing of things that are needing to be handed off, you're just already putting yourself ahead of the game.

So now I just wanna talk a little bit about the power of other people. It is very hard to ask for help and a lot of small business owners, freelancers, those of us that have very small teams, we feel like we always have to do it ourselves, and we feel bad when we have to ask for help or when we have to ask for a new hire so that somebody can come and help us do some of the work.

And I just want to address the guilt that we feel sometimes when we ask others for. . You know, maybe you feel bad that you're giving your work to somebody else, or you're afraid somebody else is gonna do a better job than you. Do not feel bad about thinking that. I think that's one of the first things that always comes to our mind.

And here's the thing, you should find somebody who will do a better job at it than you, because the goal is to take the things that you're not so great at or that take your time away. And give it to somebody else. And guess what? You want somebody else who is going to do a fantastic job because if they don't do a good job at what you hand off to them, you're gonna be very tempted to take it back.

And the whole goal of this is to be able to delegate the things that you're not great at or that you don't like to somebody who is and who loves to do whatever that thing is that you despise. Maybe you're not really worried about those things, but you're worried about just letting go of control. This is probably the biggest roadblock for anybody.

The mere fact of trying to let something go, maybe you're hesitant about paying someone else to do it, even. It could just be that the, the control itself is just really hard to let go of. After all, you are the only one who can do the job the way the jobs have been done, right? So over the past year, I've really, really embraced the power of delegation.

I've always prided myself on helping other people. And being really good at what I do so that other people feel like they can hand things off to me and trust me with things. And so I've had to learn to do that so that I can free up some of my time because I've been a lone wolf for a really long time and I was spreading my time way too thin.

So you can bet your pants. I was ready with a list of things I could hand off when I could finally hire somebody. I have a doer's mindset and that's why it's a massive part of my success. It's also a downfall and I know that, and I'm very well aware of it. So I do find myself a lot of times thinking that nobody else can do it right now.

I don't really mean that nobody else can do it, right? I mean, nobody else can do it. How I would do it and. Is hard for me to let go of. So I have some of these control issues that I'm trying to pull back on so that I can allow people the ability to help me and me let go of things to help myself as well, because I know that the next step in my business that I wanna get to is going to require a team and I can't go it alone.

So no matter how scary it was, I knew I was gonna have to delegate. So go easy on yourself and your team as you're transferring the responsibility for a project or a process or a task. It doesn't mean that you can't retain the authority, control, and accountability, that person's gonna do the work. You are still going to be the person that can oversee it and, and be accountable, and you're gonna get to the

point where your team is just going to get really good at this, and you're not always gonna have to remain in control over that task or whatever project that you're delegating.

Delegating allows you to free up a lot of your time from working on the business. So that you can get more higher level work done. You can develop your leadership skills and learn to empower your team. So when you delegate to your team, it's increasing their motivation and their confidence, and it allows them to learn new skills, have a voice in your business and in the plan and the work, and it enlists the cooperation of others as well.

So it's all a recipe for team growth from your level down to your team's. When you allow your team autonomy, they're gonna be better engaged and they're gonna have better job satisfaction. They're gonna come up with way better ideas, and now you're gonna have people on your team so you can have a meeting of the minds and so many more ideas and ways of doing things are gonna come out of having a team when it's not just you, it's not all on your shoulders.

You have a team to help you and further the business. Now before you can hand off work and allow for autonomy, you do have to set out the right resources and define the ideal outcomes. Give people some expectations. Let them understand what you expect of them, and let them be able to make mistakes. Allow them and yourself room to grow here, because this is gonna be.

But it's going to be really worth it. So as I mentioned above, I created an outsourcing list. So I've identified all those things that I, that either need my time or that don't. So I've identified my zone of genius, what's my expertise and the areas that I do the best work. Then I've identified tasks that I don't need to do to get done, and I've listed my productivity killers, things that suck my time.

like bookkeeping is one of 'em things in my business that I just don't enjoy. Again, bookkeeping, is one of those things, and maybe you love that, but that those are areas that I was easily able to outsource at the. , I take numbers two, three, and four. Those are the things that don't need me, that kill my time or that I don't enjoy doing, and I start documenting those processes.

So once you document a process, You are able to hand this off a lot more easily. The over the next week, once you decide that you have a task that you wanna hand off, let it be messy. Get a piece of paper out and write the steps, or type in a Google document the steps one through 10 or however many steps there are to getting that particular thing done.

Now I say, let it be messy here because you may not remember every single step as you go, but if you document it the next time you do it as you're going, and then you try to follow those steps the next time to double check that you captured all those steps, then you create a process. So some of the things that I started documenting right away was blogging, onboarding a new client.

Product inventory is another one. Social media posting, answering emails or customer service messages and pulling reports. Those are some easy things that you can document pretty easily, and they're things that people can start doing and start learning. And I'll say that. It's some of the things that people can start doing for you.

A really good example on my list was blogging. So once I got somebody up on the process of how to get a blog uploaded to my website, start to finish, like everything from me writing and creating it to editing it through, getting it on the website through going public or going, being published. That was a really good activity for somebody because not only did they learn the blogging process, now they learned an editing process with it.

They learned how to get something up on the website. So in that process, they actually navigated some of the other things and developed some of the skills and tools. That are gonna help them in some of the other tasks that I'm gonna hand off, I like to make these processes really simple with check boxes.

I clean up my processes once I've made sure I've captured all the steps. And then I make it real easy to just go through, try not to write too many details, make check boxes and sub check boxes. , if you. Just be open. Also, once you the process to somebody else to look at, just be open to making adjustments because like when someone else is stepping into the process, just don't be too rigid because they might have some really good ideas for you.

And that's the whole point of having a team is having some people come in and help you and you might discover that there's some steps that could be. Or shortcuts that could be made, or maybe there's a better way of doing it. So just don't be rigid. Be open to hearing what they have to say, especially if they have some experience in what they're doing for you.

You might actually find a better way, and in some cases you might actually even be able to allow them to write the whole process for you. And that takes ano. Yeah. Another thing off your list, I'd like to remind everyone to look at processes as living and flexible. They're meant to be a guide and fine tuned during the journey.

Things change all the time. Stuff on the back end of your website's going to change and it's gonna have to. It means your process is gonna have to be adjusted, so just look at these as a living, breathing process that might need to be updated later. It's just a guide that will help everybody who has to touch this task, get through it, and do it properly.

So once you've identified processes, you're gonna wanna identify any special skills that you want a person to have that maybe they don't have or that you don't wanna have to coach them on. So, for example, if you're outsourcing website work, look for somebody with experience on website. The platform that you're using and the theme that you're using is another step as well.

If you have product inventory and you Shopify, you should look for somebody who has experience with Shopify. They don't have to be an expert, but some experience is helpful. Even if they have just general website experience, that might be enough for you to get them. Trained up and working through your processes.

And sometimes that even comes off better because now you can train them the way you want them to do it, and they don't come with any preconceived ideas or notions. They just have a general understanding of how to work on that platform and they can apply your process super easy. So now you're ready to delegate.

Do you have a team member that you can delegate to or do you need to hire someone? Maybe you have a team member who can do this work and would be eager to take on new responsibility, but if not, maybe you need to hire a freelancer or maybe you need a new team member that has the skills that you're looking to fill.

So combine similar tasks. If you have multiple tasks to offload and find a person who can do all or most of those things, keep it reasonable for the time allotted to their day or to their contracted amount. Be prepared to train and support team members through this process. A new person with some skills will still be acclimating to your communication style and how your businesses runs the ins and outs, the business model that you.

But an existing team member will be adjusting to stepping into a new role and probably learning new things and skills with you. So either way, you're just gonna have to be very prepared to help support this person. And the more you support this person, the faster they're gonna pick it up, and the faster they're gonna be able to support you.

Both of these, whether you hire a new person or train a current employee, both are gonna really require some strong leadership through guidance and support. It's a chance to sharpen your leadership skills, so it's good for you as well. Let's talk a little bit about the support and the guidance, because it's really important piece of all of this delegation.

The first step is to clearly identify the desired outcomes and tie it to your business. What is done, quote unquote, done look like to you? And what does quote unquote good look like to you? So identify what those things mean to you so that you know when you're in the situation and you've hand something off, what there's something's done, or whether something is good.

That way you can communicate that to people. So what's the timeline? How do you measure accomplishment? How do you communicate that? And what are the tools that you're gonna have your team use to get the job? Let's do a little example here. So Sarah's new to the team. She was hired to take over social media posting.

We have a checklist for the process of scheduling posts. So our team corresponds in a messaging platform and we have shared files for all of the team members to access the assets and our client documents. We create the assets captions, and Sarah is going to copy the captions and add the photos. So we create the assets and the captions for the social post.

But Sarah is going to copy those captions and she's gonna take the assets and she's gonna put them into the social scheduler and she's gonna set the publishing time. So Sarah was trained in our, on our internal processes, which are documented around communication, where to find the documents, how to communicate with the team and everything that she needs to complete her job.

She does have experience. on the social scheduling platform that we're using. So she was familiar and didn't require training other than how to, you know, how we use the platform and how we communicate. So Sarah was given the written process that we had laid out. She and I walked through the process together step by step.

I answered any questions that she's had, and I sat with her also while she runs through the process. So now I know she's ready to work on her own without supervision. But I do know that I still need to oversee, and she needs to have a little bit of accountability until she really gets used to what we do in our process.

So now Sarah runs into a question with the Post. She knows she can reach out to me via messenger. So she asks the question and I answer her question. Now she's able to proceed and continues with the process. She does a second rundown the process to ensure she did everything on the list, and then she communicates with me again to let me know that the posts are ready for my review.

Now I go and I review the posts. There are a few changes that need to be made, but I don't make them. I'm super tempted to make them. But I don't make them here because I want to give Sarah the opportunity to have my feedback and to update these items because that will help her look for those items. The next time that we have changes, that's where I can help and I can guide her on the specific information that maybe is specific to our industry or what my preferences are.

So now she can go back, she can update the work, asks for a final review. Everything's good. I okay it. The work is. So that is what good work looks like to me. The expectation was not for her to be perfect in the beginning, it was just doing the work and learning it, getting feedback from me and you know, sometimes identifying the things that weren't addressed during training, which always happens, like we're all busy.

People who are training can only take so much information in so it, you know, once they are able to do the process and you're able to have a back and forth with that a couple times. Now I know where Sarah is in her progress and she's starting to learn, so my extra review and feedback to Sarah is gonna help her improve much more quickly.

Then if I just let her out on her own and didn't give her any feedback. So the next caution I have for you is just check your judgment here. It can get really tricky, especially if you're not patient like me. Focus on helpful feedback to give them, you know, to guide the behavior rather than coming across agitated or inconvenient.

The more comfortable they feel when you give them positive feedback or negative or you know, not necessarily negative feedback, but just when you give 'em feedback that maybe is like, oh, this needs to be fixed. If you can come across easygoing, not annoyed or inconvenienced, they're going to learn much quicker.

When people are in a situation where they feel a lot of pressure and they feel like you're gonna be mad at them, they tend to make more mistakes. So tips for

success are just don't make the corrections yourself. Send it back and get that person in the mode of thinking the way that you want them to think.

Help them hear, learn. What you, you know how you would say something, how you would do something. It's all a learning experience. It is not negative criticism. Just give a clear explanation of what's not right. Explain the preference if it's not wrong. So sometimes the changes aren't necessarily right or wrong, they're just whatever the preference is for a client or how you like to say something.

So be very self-aware of what's actually a preference versus what's really right. And. Now the next one's gonna be a little hard. Ask for feedback yourself. This is not a one-way street. You are learning just like they are because if you're, especially if you don't have a big team or you didn't have a team before and you're just starting to delegate, you are learning how to guide somebody and you're learning how to hand procedures off to someone.

So, Ask if you've asked this person, if you've provided explicit instruction, if you feel, if they feel like what you provided to them was enough for them to start learning and getting better, because that's gonna help you improve and do better when you delegate in the future. And then lastly, give thanks and credit.

Don't be afraid to be grateful and recognize success, even if it's not perfect. Encouragement and positivity help breed confidence and future wins. Now, I know this was a lot of information today, but it's going to help you identify what you want to start delegating, how to create a process to delegate that more successfully.

And then how to work with new team members or current team members on delegating and creating processes that are gonna help the entire team be successful. So you might wanna come back to this episode a couple times because there's several steps in it. But you can also visit the show notes if you wanna print a copy of all this information out, and I recommend maybe pop in some of this stuff into Asana to help you get working on it.

Just remember baby steps. It is just breaking a process down bit by bit until you get to the end. Any little progress, even if you spend five minutes today identifying some of the things that you wanna. Even if it's just today, starting to get that notepad out and for the rest of the day, you start documenting the things that you're doing to start creating a list of the things you wanna delegate.

It's all about getting started, being aware of the power of delegation. So if you've been thinking about it for a while, you have some next steps that you can take to start working towards actually delegating some of those things so that you can become a better business owner and leader to help you and your team thrive.

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