FREE RESOURCE

The Delegation Readiness Guide

How to figure out what to hand off, get it ready for someone else, and actually let it go.

- ✓ TIME AUDIT
- ✓ HANDOFF BRIEF
- ✓ ACCESS CHECKLIST
- ✓ 30-DAY PLAN

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BEFORE YOU START

You can't delegate what only lives in your head.

Most business owners know they need help long before they actually get it.

The hesitation usually sounds something like this: "It's faster if I just do it myself." "Nobody's going to do it the way I do." "I wouldn't even know where to start." Or maybe you tried delegating once, it didn't go well, and you quietly took everything back.

Here's the thing. When delegation stalls, the work usually wasn't ready to hand off yet. The steps weren't written down, the files were scattered, and "just use your judgment" was doing a lot of heavy lifting.

This short guide walks you through getting ready: seeing where your time goes, choosing what to hand off first, preparing each task, and setting up the first 30 days so it sticks.

QUICK CHECK

Which of these sound like your week?

- [ ] Admin work regularly spills into evenings
- [ ] Clients wait on you for simple things
- [ ] You say "I'll just do it myself" a lot
- [ ] Things slip because everything runs through you
- [ ] You've turned down work because you're maxed out
- [ ] A real day off feels impossible
- [ ] You spend more time on the business than in it
- [ ] You're not sure what help would even look like

If you checked three or more, you're likely ready for support. The rest of this guide helps you get the work ready too.

STEP ONE

Know Where Your Time Goes

You can't decide what to hand off until you can see what you're actually doing.

For one normal work week, jot down the tasks you spend time on. Keep it rough. You're looking for patterns, so estimates are fine. Pay extra attention to the small things you do without thinking, like answering scheduling emails or tracking down a file. Those add up faster than you'd expect.

TASK	TIME SPENT	CATEGORY Admin, Client, Growth, Other	HOW DOES IT FEEL? Drains, Neutral, Energizes
Scheduling and rescheduling client calls	*2.5 hrs*	*Admin*	*Drains*

Watch for the "drains + admin" combination. Tasks that are both administrative and draining are usually your best delegation candidates. Someone else may genuinely enjoy the work you've been dreading.

STEP TWO

Run Every Task Through the Filter

Sort each task from your time audit into one of these four groups. Be honest here. A lot of things that feel like "only I can do this" turn out to be "only I know how to do this right now," and that's a documentation problem you can solve.

KEEP IT

Only You

Work that depends on your expertise, your judgment, or your relationships.

Client sessions, strategy, final creative direction, key partnerships, pricing decisions

HAND IT OFF

Could Be Taught

Recurring work with steps you could explain to someone with the right instructions.

Inbox triage, scheduling, invoicing, onboarding admin, posting content, file organization

SIMPLIFY IT

Could Be Templated or Automated

Work you repeat the same way every time, often with nearly identical wording.

Welcome emails, appointment reminders, intake forms, payment reminders, FAQ replies

DROP IT

Could Be Eliminated

Work you keep doing out of habit that no longer serves the business or your clients.

Reports nobody reads, duplicate tracking, meetings without a purpose, platforms you've outgrown

START SMALL: MY FIRST THREE TASKS TO DELEGATE

Pick from "Could Be Taught." The best first tasks are recurring, low-risk, and easy to check when they're done.

1 ______________________________

2 ______________________________

3 ______________________________

STEP THREE

Get the Task Ready to Leave

If the instructions live in your head, your support person has to keep coming back to you with questions, and you end up spending almost as much time as if you'd done it yourself. A little prep up front saves you hours later. Start messy: a rough screen recording of you doing the task is a perfectly good first draft.

HANDOFF PREP

- [ ] Write down the steps, even roughly
- [ ] Record a screen walkthrough while you do it
  Talk out loud as you go. Tools like Loom make this easy.
- [ ] Gather every file, template, and example in one Drive folder
- [ ] List the tools and logins the task requires
- [ ] Define what "done" looks like
- [ ] Note how often it happens and when it's due
- [ ] Write down the common exceptions and curveballs
- [ ] Decide who they ask, and how, when they're stuck

SAFE ACCESS

- [ ] Share logins through a password manager
- [ ] Share specific Drive folders, never your entire Drive
- [ ] Use Gmail delegation instead of sharing your password
  Settings, then Accounts, then "Grant access to your account."
- [ ] Share your calendar with "Make changes to events"
- [ ] Use each tool's team or user roles where available
- [ ] Keep two-factor authentication turned on
- [ ] Keep a record of who has access to what
- [ ] Know how you'll remove access if things change

> *"If you've ever said 'it's easier to just do it myself,' it's probably because the task was never written down."*

STEP FOUR

The Handoff Brief

Fill out one of these for every task you hand off. Save it in the same Drive folder as the files and recording. It becomes the starting point for a full SOP later.

Task name

Why it matters
What happens when this is done well?

Frequency + due date
Daily, weekly, monthly?

Tools + access needed

Where the steps live
Link to notes, SOP, or recording

What "done" looks like

If this happens, do this
Common exceptions

Questions go to
Who, and through which channel

STEP FIVE

Set It Up to Stick

Before the first task changes hands, agree on where requests go, how often you'll check in, and what counts as urgent. Then decide how much freedom your support person has. This one conversation prevents a lot of "Should I have asked first?" moments.

Decision levels

Just Do It

Handle it without checking in. Example: rescheduling an appointment within your availability.

Do It + Tell Me

Handle it, then give a quick heads up. Example: replying to a client question using an FAQ.

Ask Me First

Check before acting. Example: offering a discount or changing a client's scope.

The first 30 days

Expect questions and a few small mistakes. That's the training period doing its job, and it gets noticeably easier by week four.

WEEK 1

Set up + walk through

- Share access and handoff briefs
- Walk through each task
- Start with one small task

WEEK 2

Hand off with review

- They take over recurring tasks
- You review before it goes out

WEEK 3

Adjust + document

- Share specific, kind feedback
- Update instructions
- Review less often

WEEK 4

Review + expand

- Talk through what's working
- Choose the next task to hand off

A FINAL NOTE

Your Business Can Grow Past Your Calendar

Delegation gives you room to focus on the work only you can do, and to step away without everything stopping.

If you worked through this guide, you now know where your time goes, which tasks are ready to leave your plate, and how to set someone up to take them over. That's the hard part.

If you're ready to hand things off but want a partner in the process, that's exactly where Blu Creative Collective comes in. We can help with:

- Taking over recurring admin and inbox management
- Organizing your Drive and systems for handoff
- Setting up workflows in the tools you already use
- Turning your walkthroughs into clear SOPs
- Managing client onboarding and scheduling
- Ongoing online business management support

We work with the tools you already have, learn how your business runs, and take recurring responsibilities off your plate so you can get back to the work you love.

READY TO HAND SOME THINGS OFF?

Let's find what's ready to leave your plate.

We'll look at where your time is going and build a plan for support that makes your week feel a little lighter.

EXPLORE WORKING TOGETHER

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BLU CREATIVE COLLECTIVE STUDIO INC.
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