DELEGATION & COMMUNICATION Tips

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The action that’s keeping you SAFE is also the one that’s keeping you STUCK.

It’s safe right now to keep everything you’re doing on your plate.

- Keep managing your calendar so no one messes up your schedule.
- Keep people out of your inbox so that you can respond the way you want.
- Keep doing the client-work yourself so that no one makes a mistake.

Keeping these things on your plate, don’t move you towards a different future, they keep you where you are...which is fine if you’re fine to stay there, just make that choice consciously + intentionally if so.

Here’s some quick tips on how to start handing things over to team members with a little more trust + confidence...even if you’re a control freak.
1. Start with the right tasks:

- Low-stakes
- Simple
- Easy to capture

You don’t want to start handing over things to team members that are what we call ‘high-stakes’. A much better approach is to hand over things that are lower stakes tasks, responsibilities, + decisions. Start with things that are easier for you to capture + hand over, things that are simple.

2. Delegate properly using the IPO approach:

- Information (what information do they need to accomplish this)
- Permission (hand over permission to make decisions)
- Outcome (what is the outcome / success criteria you’re looking to achieve)

Delegating will be less risky if you tell them where they’re actually going + what success looks like, give them permission to be autonomous + give them the resources they need to get there.
3. Have them submit an EOD stand-up:

- What did you do today?
- What obstacles / concerns did you run up against?
- Do you need my help with anything?
- What will you be focused on tomorrow?

At the end of the day, especially during the training/onboarding period, have them submit a daily stand-up to give you information about what’s going on, where they’re struggling or need more information to effectively do the job, open the line of communication in case they need help, and help them get better at priority-setting by asking them to get clear on next-day focus. You don’t need to ask them for this -- communicate this once at the beginning of the working relationship + have them send you the responses daily.

4. Adjust your expectations:

- You have to be part of the process if you want them to be successful in their role.
- You can hire the best people, but you'll always be disappointed if
- You never take the time to share about YOUR business + needs.
- Baby step it every day and you'll get where you want to be —
- DON’T TAKE IT BACK ON YOURSELF, take the time to improve the process + relationship!

Do this + not only will you trust people more to take over some of the DOING that’s falling on your plate, but you’ll end up with a WHOLE LOT MORE free time as well.
IPO Delegation Framework

*Don’t delegate anything without going through the IPO.*

1. INFORMATION

What resources or information will they need to accomplish this or to make good decisions?

*(sometimes this stuff lives in your head + we wonder why they can’t be 5 steps ahead!)*

Some examples we have our clients start with are:

- Access – passwords, documents needed, approvals, authority, calendars, etc.
- Money needed, access to credit cards, PayPal accounts
- Expertise needed – “how to” courses, blog posts, training sessions
- Manpower – team members, outside contractors
- Software
- Systems / Checklists
- Decision-Making Guidelines
- Deadlines, Hours allocated to complete
- Equipment / Hardware
2. PERMISSION

Yes, they need permission, making decisions can be scary for them!

So let them know you WANT them to make these decisions so that they feel safer about it + ask if there is any additional information they need to make good decisions.

Give them permission to own this role, make decisions, take on this responsibility/project.

Be clear about what you are handing over + that you’d like them to make decisions in this area of responsibility or what decisions you DON’T want them to make.

3. OUTCOME

What is the outcome criteria of this project or role? How will we know when it’s complete + how will they know they’ve been successful?

- Specifications of finished project defined
- # of new clients increased week over week to X
- Customers have a completion rate of 85% or higher
- Refund rate reduced to 5%
- 10 speaking events booked per month
Communication Cadence:

To be successful with any team member, you must be willing to openly communicate with them, this needs to happen more frequently in the beginning to establish trust, confidence and a relationship.

This is a recommended communication cadence that you can adjust as the relationship develops + performance improves.

1. MEET INITIALLY

To share an overview of how the company works, what the next quarter looks like, and what the biggest priorities are for the team for the next 90 days.

2. MEET WEEKLY

for a 30 minute check-in -- this meeting should be used to check-in with your team member, see how they’re doing, what they may need more support with, and you can communicate any additional needs or shifts in priorities (they will know priorities from asana board).
3. HAVE THE TEAM MEMBER SEND IN A DAILY EOD

(end of day) ‘stand-up’ report to you (we do these via slack, but use whatever communication tool your team is most comfortable with (slack, text, email, asana card). They will send you the stand up with answers to the following questions EVERY DAY in the beginning (you can then determine after 30 days if you want this to continue or not -- we still do ours with our team because I like seeing it).

- What did you do today?
- What obstacles / concerns did you run up against?
- Do you need my help with anything?
- What will you be focused on tomorrow?

4. SHARE WITH THE TEAM MEMBER WHERE WE DO NOT COMMUNICATE

Where you prefer to receive questions or messages from them when they do come up. For example -- our team doesn't use email internally AT ALL.

- We use Slack for all one-off communications and a project management tool is used for assigning tasks.
- We NEVER assign tasks via email, Slack, text message, etc.
- Using each tool for it's intended purpose is important to streamline communications.