

Busy CEO Needs Help Creating an Effective Accountability Management System for His Team



delegatē*
Strategic Support™ | Freedom Found

A Client Case Study

Client: CEO, Distribution Co.

L&R Distributors
New York, NY

About Delegate Solutions:

We provide consultative executive support for entrepreneurial leaders and their teams. We help them leverage their time through delegation and provide a dedicated support team to help them create more freedom to do what they love and have a big impact.

Executive Summary

Marc is the CEO and Board member for a major national distribution company. When Marc came to Delegate Solutions, he had just lost an in-office assistant and was in the thick of suddenly handling too many administrative tasks on his own. He was looking for someone to create consistent accountability across his team and bring good systems to better leverage him and protect his time.

Our Strategic Support™ team worked to create a reliable delegation management system while also cultivating a strong, trusting relationship with both him and his team. This resulted in immediate leverage for him, as well as increased levels of accountability, systemization and growth.

With the help of the Delegate Solutions team, Marc's time has now been leveraged such that he is able to focus more on the growth and future of his organization, and he reports increased productivity across his team and a sense of calm within the company.

Client Challenges

One of the primary challenges Marc faced when our team came onboard was a lack of follow-through and accountability by his team. This caused frustration and a lack of trust in the team's commitment to the vision of the organization. It also led to Marc feeling that he would be better off handling tasks on his own, thus distracting him from his most impactful work. He needed a delegation management system to help keep things moving.

How Our Service Helped

To begin, we assessed Marc's top goals and priorities and created a customized delegation strategy. We integrated tools like Strategic Coach's® Impact Filter to help organize and strategize the delegations. We deployed weekly planning and accountability calls for clear and consistent communication with Marc, and optimized his task management system, Asana, into a true delegation management tool.

Next, we clarified his preferences and aligned on responsibilities for his team. We assigned tasks to the appropriate team members with details and due dates tailored to project deadlines and team capacity. We began to maintain project deadlines, task the appropriate assignees and holding the team accountable for their tasks.

We provided training for his team members to ensure their confidence in Asana usage to manage their workflow. We established process guides which outlined each step of the new accountability measures. This ensured that the process could be easily repeated or delegated to a team member within the client's organization.

Results, Return on Investment and Future Plans

By optimizing Asana into a true delegation management system, and getting the right tasks assigned to the right people, we are now better able to track progress made on projects and task. Marc's team was slow to adopt the new process and technology, so the Delegate Solutions team created a simple email reminder system for his team. By using the upgraded version of Asana, we are able to perform advanced searches for tasks assigned to a specific person, as well as customized searches for tasks that are overdue or due within the next week.

Our team continues to run weekly searches and copies and pastes the URL of the search results into an email, asking the accountable team member for an update on progress. In the event that they don't report back with an update their tasks, our team sends a friendly reminder in Slack with the Asana task URL. This has resulted in increased transparency and improved team-wide accountability surrounding projects and tasks. When tasks/projects fall behind or due dates are missed, our team works to help diagnose roadblocks and offer strategic solutions to avoid any future productivity bottlenecks within the projects.

Marc and his team are now seeing the value of a true delegation management system in conjunction with our accountability support plan. With our help, they are beginning to get on the same page for many tasks. This has better leveraged his time by allowing him to simply monitor the progress and ultimate completion of delegated tasks inside of the system, rather than taking back the tasks himself and decreasing his own efficiency.

Client Testimonial



"I am constantly on the move and relied on mutual agreements by my team members to meet or exceed deadlines on tasks and projects. Many times they performed exemplary, but sometimes they did not. My team at Delegate has created systems of accountability to monitor status and track delays. With their help I feel we are much more in control of the timelines and aware of when projects will get done. This has been a powerful and easy way to transform doubt and fear of things being missed to awareness and comfort that things are in order." -- Marc Bodner, CEO

Tools and Technology Utilized

