

CEO of a Growing Non-Profit Elevates his Ability to Execute with the Help of a Strategic Virtual Assistant Team



A Client Case Study

Client: CEO of Non-Profit

MACPA: Maryland Association of CPAs
Towson, MD

delegate^{*}
Strategic Support™ | Freedom Found

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

Tom Hood is the CEO of both the Maryland Association of CPAs, and the Business Learning Institute, and is also one of the most influential leaders in the Accounting field. Like many executives of smaller non-profits, his time had reached its limit. His time is spent as part thought leader, part business coach, part salesperson, and part legislative advocate; but he's also a manager, a problem solver, a negotiator, and a human resources director. Like many small business executives, he wears nearly every hat in the organization, and needed to create space in his day to do his most impactful work.

When Tom came to Delegate, his organization was experiencing challenges related to rapid growth, and he needed to get his employees aligned, organized, and working within their Unique Abilities®; especially himself. Tom understood the value of his contribution towards the growth of the organization and needed to find a way to increase his own level of productivity through delegation.

Our team immediately began the process of identifying administrative and project management tasks that were taking up valuable time and resources across the entire MACPA team. Our team began by capturing all repeatable processes to effectively take over those tasks. Tom estimates that our help allowed him to increase his own productivity by 15%!

Client Challenges

Tom came to Delegate feeling overwhelmed and ready to hand off tasks, but he needed full confidence that once they were taken over, they would be completed to his standards, efficiently and without errors. As we aim to do with all clients, we asked Tom to “trust the process”, which required transparent communication on weekly accountability calls between our team and Tom around expectations and task priority. As soon as Tom realized that things were getting done efficiently, reliably and with a high level of accuracy, our Associates were able to start completely taking over things like email and calendar management. Once he started to experience the relief of having a Strategic Support® team in place, and time consuming administrative tasks were coming off his plate, he was able to focus more fully and engage in higher-level and business development tasks.

How Our Service Helped

As we do with all clients, once we completed our onboarding interview and created Tom’s Strategic Action Plan, we set out to identify the “low-hanging fruit”, along with tasks that were repeatable and delegatable. After identifying our next best steps, our team got to work confirming access to all necessary tech platforms. We took over basic admin tasks such as inbox and calendar management. We provided gatekeeper scheduling by building buffer time into his schedule and color-coding his calendar so he could quickly identify high-priority/revenue driving meetings. We then wrangled everything into Asana as a way to organize tasks and projects and keep key priorities front and center for Tom each day. The team continued to identify other tasks that could come off his plate, such as extensive travel logistics planning and event/conference/keynote coordination for Tom and his team. Similarly, as is our practice with all clients, our team captured each process along the way to ensure preferences and nuances surrounding each task are documented.

Results, Return on Investment and Future Plans

Once the Delegate Team was fully engaged in Tom’s administrative tasks, his larger MACPA team saw great value in utilizing our Strategic Support® services, as well. We then started using the EOS Delegate and Elevate™ exercise with MACPA’s leadership team in order to identify areas of additional delegation. By understanding their own strengths and allowing us to take administrative tasks off of their plate, we were able to truly leverage their time so that their time is spent working in their Unique Ability™.

With help, Tom has been able to focus more on the big picture and is not bogged down by the details. He feels confident our team is behind the scenes supporting him and ensuring none of the details are falling through the cracks. By anticipating his needs and taking care of things before he has the chance to ask for them, Tom has found peace of mind in our thoughtful, strategic, consistent approach to freeing up his time to focus on the things that truly demand his time and focus.

Client Testimonial



“Delegate Solutions has been instrumental in helping MACPA accomplish one of the most important things an organization can do — save time for the CEO. They have extensive experience with all of our fundamental business systems and processes, and they do it in a systematic way that helps bring order to my chaos. Working with the Delegate Team has been an amazing experience. I estimate that with their help, my productivity has increased at least 15%!”
-- Tom Hood, CEO; Maryland Assoc. of CPAs

Tools and Technology Utilized



Are you looking to increase your productivity like Tom? We can help! We work with executives & entrepreneurs like you every day to help clear their plates and focus on what they do best!

Let's chat about how we can help YOU!