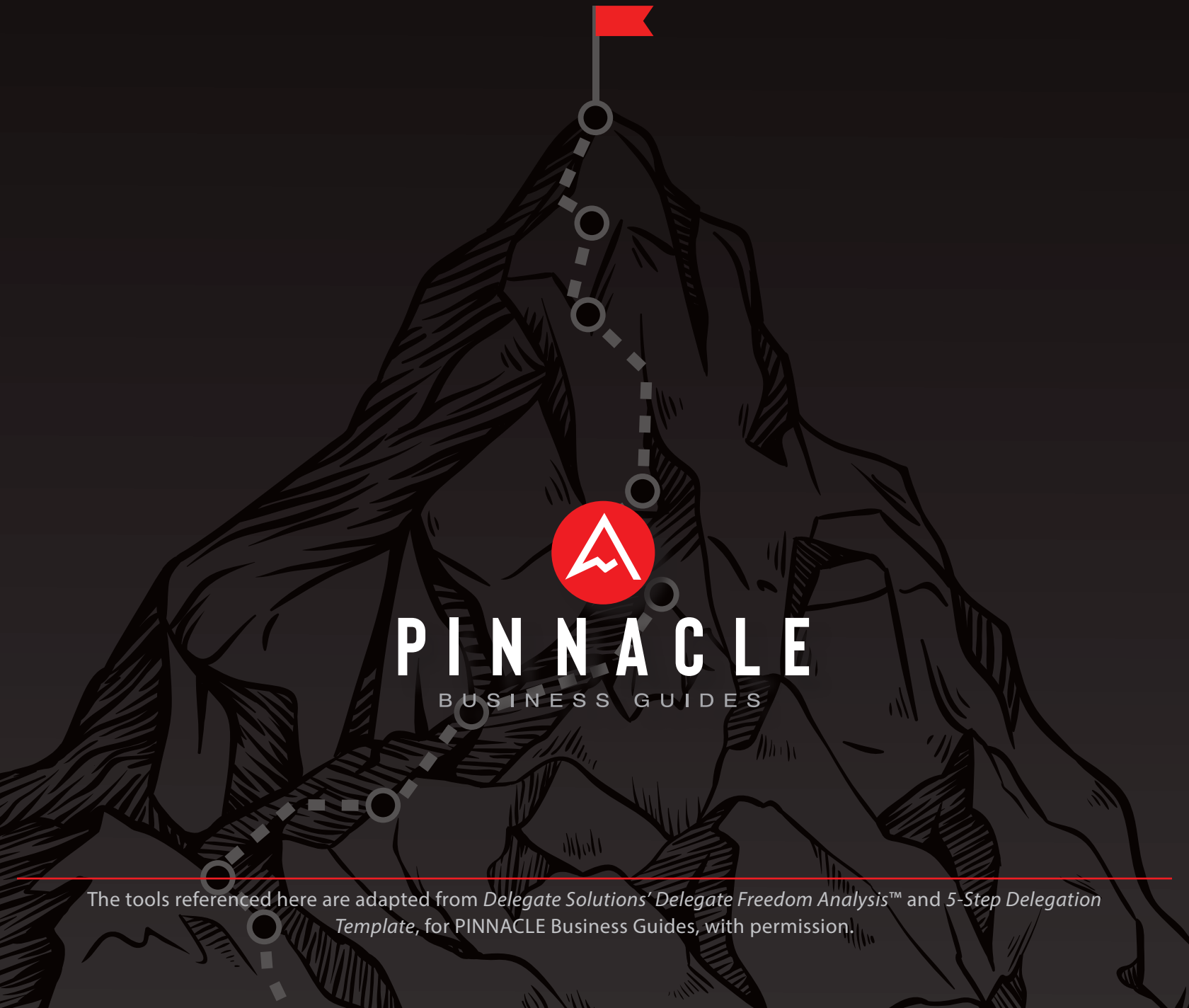


GUIDE'S GUIDE

LETTING GO



PINNACLE
BUSINESS GUIDES

The tools referenced here are adapted from *Delegate Solutions' Delegate Freedom Analysis™* and *5-Step Delegation Template*, for PINNACLE Business Guides, with permission.

DELEGATE FREEDOM ANALYSIS™

USE THIS TOOL WITH CLIENTS WHO

- Have difficulty determining what to let go of.
- Have already been delegating and are looking for new tasks to delegate.
- Need to understand the impact of misspent time and what it is costing them.
- Want to objectively look at the tasks they are handling.

STEP 1: UPPER RIGHT CORNER

- Start with the positive.
- You could spend all day working on these tasks and never tire.
- Any time freed up should be spent here.

Guide: “Let’s start in the upper right-hand corner with tasks that naturally inspire and motivate you. We want to get you to where you are doing these things. Like our whole journey, we always start in this corner, with the positive. These are tasks you enjoy, are good at, and could spend all day doing. This is your genius area, your Unique Ability™, and it is where you have the greatest impact on your business. When you do work here, you are delivering on the promise of your job! What tasks belong here?”

STEP 2: LOWER RIGHT CORNER

- This is where you feel brain drain.
- Ask yourself, “What tasks totally suck away my energy and time?”
- Attribute the amount of time you spend on these tasks.

Guide: “Now let’s go to the lower right-hand corner. All tasks you are not naturally good at and don’t enjoy, belong here. These may be tasks that you delay completing because they do not bring you fulfillment. They drain your brain, deplete your energy, frustrate you, and may also be time suckers. While you are adding tasks here, be sure to include an approximation of how much time each week you spend on these tasks. Check your journal for ideas. We call this the “Suck Bucket.”

STEP 3: LOWER LEFT CORNER

- What are the things you are hanging on to but are begrudgingly doing?
- You don't like doing these tasks, but you could be good at them.
- Attribute the time you spend on these tasks.

Guide: "Next is the lower left-hand corner. List all tasks in this corner that you find yourself doing, and are good at, but don't necessarily enjoy doing. Again, include an approximation of how much time each week you spend doing this. We call this the "Martyr Zone."

STEP 4: UPPER LEFT CORNER

- You may be quite good at these tasks, but they could be accomplished at a more junior level.
- You're doing it more than once.

Guide: "Next is the upper left-hand corner. List tasks here that you are quite good at but could be accomplished at a more junior level. While you may not have many tasks to list in this corner, you may be carrying out these tasks because they are comfortable. Tasks in this corner may be impactful, but if you are repeatably handling them, it is likely they can be turned into delegations. We call this the 'Letting Go of Excellent' corner."

CLOSING

Guide: The purpose of this analysis is to work toward redirecting our newfound time and energy to the items in the upper right-hand quadrant. This is where we make the biggest impact on our business. To get started, select one item from the lower right quadrant and complete the steps of the delegation template. Let's make it happen and get you to 'Your Ideal Day!'

Note to the Guide: If you have a client who may want to go deeper with delegation, encourage them to read Emily Morgan's book, *Let It Go, How to (Finally) Master Delegation & Scale Freedom Across Your Organization*. The URL for the book is: <https://info.delegatesolutions.com/let-it-go-book> The first two chapters are available as a free download.

LETTING GO

*Adapted from Delegate Solutions' Delegate Freedom Analysis™ and
5-Step Delegation Template, for PINNACLE Business Guides, with permission.*

LETTING GO

DELEGATION IS THE FOUNDATION FOR GROWTH.



PINNACLE
BUSINESS GUIDES

ANALYSIS WORKSHEET

DELEGATION IS THE FOUNDATION FOR GROWTH.

In the exercise below, reflect on how you currently spend your time. Look back over the last few weeks and begin to list each activity in the appropriate section. Getting really clear on the most impactful use of your time is the key to creating a successful delegation strategy that actually brings you ROI, so start with #1 below.

THESE ARE THINGS YOU ARE QUITE GOOD AT, BUT THEY COULD BE BETTER ACCOMPLISHED AT A MORE JUNIOR LEVEL.

4

THIS IS WHAT YOU LOVE TO DO, AND IT PROVIDES THE GREATEST IMPACT. YOU COULD SPEND ALL YOUR TIME HERE.

1

START
HERE!

YOU FIND YOURSELF DOING THESE TASKS, AND YOU MAY BE GOOD AT THEM, BUT YOU DON'T NECESSARILY LIKE DOING THEM.

3

YOU DREAD DOING THESE TASKS. THEY HAVE GOT TO GO.

2

Now that you have filled in boxes one through four, consider what could or should be delegated. Create a plan to hand off tasks identified in the bottom boxes as soon as possible. Look for repeatable activities in the top boxes, as those may be suitable for delegation! Run this exercise periodically to increase the delegation of appropriate tasks to the most appropriate person.

DELEGATE WORKSHEET

- 1 Explain Assignment Details.** *Provide a high-level overview of the assignment. Explain why it is important. E.g., What is the bigger goal or project that it impacts? Identify key steps.*

- 2 Set Timing Expectations: Is there a due date?** *If yes, what date and time is it due? Is this an ongoing assignment? If yes, what are the check-in points? How much time should be allocated to this assignment? Is this a Rock? If yes, switch to a FAST Rock Planner.*

- 3 Set End-Result Expectations.** *What does "Done" look like?*

- 4 What Resources are Required?** *People, financial, equipment, material, etc.*

- 5 What is the Level of Delegation?** *Check one.*

- ☐ *Assess, research, and report back before taking action.*
- ☐ *Handle, and provide regular updates (see check-in points, above).*
- ☐ *Handle, and report final results.*

DELEGATION IS THE FOUNDATION FOR GROWTH.

THE CLIMB

Climbing a mountain may be the ultimate metaphor for business growth.

Having a clearly defined strategy is essential. Do you know the route? Have you packed the right tools? Do you know which crevasses to avoid? Have you assembled the best?

If your goal is to get to the summit, you'll need to travel light so you're agile and responsive — but still ready for any storm or clear climbing window. The peak is not always in sight so you'll need to visualize the goal, keep your plan in mind and pace yourself.

Right now is a good time to double-check the current conditions and assemble your team for a tough new journey. It's never a solo climb so you'll need a good guide, the right people in the right boots, the best guidebooks and a willingness to follow in the footsteps of others.

As you know, the final 10% of any journey is when fatigue sets in. Some of the team will want to quit, but that's the time to dig in and lead them to the summit.

Like any good climber, you'll need to check your compass and playbook often to achieve your daily elevation gain. When you reach the PINNACLE® together, you'll be rewarded with a spectacular 360-degree view that very few ever see.



PINNACLEBusinessGuides.com