PODCAST TRANSCRIPT

Episode 060 with Lor Bradley

How To Delegate Without Losing Control Of Your Business!

Introduction

One of my biggest learning curves when I was scaling a business in the early years was learning how to bring people into my comfort zone and trust them to get on with the job they were there to do.

And if you're starting to onboard new members into your teams, or you're thinking about it then it's natural to feel a level of resistance to letting go of what you've worked so hard to create. You've brought your business to where it is today and I 'get it', its super hard to let go of your business baby and hand parts of that over to other people who may not have the same level of passion or vested interest in your business.

And one of the mindset habits you need to break when you are growing your teams is stepping away from the operational minutia and into leadership, and that means trusting your people with the work you now need to let go of.

This is one of my most asked questions from my 1-2-1 clients, so I've decided to put the answer to that into a podcast so today I'm going to take you on a huge deep dive into how to delegate like a CEO and without losing control of your business!

I'm Lor Bradley, I'm a business strategist and I show coaches, consultants, and service-based entrepreneurs how to scale a business beyond 7-figures by working smarter, and not harder.

Alright, let's get started.

Delegate To Step Into Your CEO Role

Around 25 years ago when I built a team from a handful to over 100 people, learning how to delegate the things I wanted to get done was one of the most important skills I ever learned in business.

Not just from the perspective of freeing up my time (which of course is a HUGE reason for doing it) but learning how to effectively delegate to my people helped me to grow my

leadership mindset, it expanded my decision-making capabilities and it empowered and motivated the people who were working for me.

And it's usually the case that when you are working on your own in your business and thinking about scaling, or if have a small team around you, that delegating is more than likely a skill you haven't been taught.

And if you are actively delegating; you might be missing opportunities to use delegation in such a way that you can really grow your business, and your own CEO role.

And years ago, one of the hardest things for me was accepting that I couldn't do everything myself. I'm also a perfectionist so I found the thought of letting go of the things I'd created terrifying. And I remember I went through a stage of working even harder and working longer hours, just because I didn't want to let go of the reigns.

It was exhausting and I felt close to burnout many times from the stress of avoiding delegation.

But – here's the thing - learning to let go and learning to delegate effectively IS going to be essential if you want to have a successful, thriving business.

And if you get into the mindset of making delegation a part of your day to day, then delegation is going to help you to free up your time to focus on your CEO role without drowning under the weight of those day-to-day tasks.

So, remember, what's key here as you scale your business is stepping out of the minutia to give yourself time and space to think strategically.

And if you are anything like I was a long time ago, then there are probably many tasks eating into your time which you probably shouldn't be doing at all. For example, podcast editing or scheduling social media posts are a couple of quick things that spring to mind that I see many still doing when they're busy scaling.

But I also want you to think broader than the tactical tasks you're doing that you should be delegating. You need to be focusing on the strategic tasks and the strategic decisions you need to be making as the leader of your business.

So, when you can delegate your low priority and lower impact tasks to your team, you're then able to laser your focus on setting and hitting your business goals.

And that's where your mindset needs to be at when you're scaling.

What's Stopping You From Getting Started?

So, like I said earlier, if you're like me and you've built your business by yourself and you've always taken care of all the tasks needed to get your business to where it is today, then you may find it a challenge to just start delegating some of those tasks to your new team.

And I get why that is. You've made an emotional investment in your business and your success. And when you remove yourself from what's made you successful then those mind monkeys creep in and basically keep you where you are.

But it's important to remember that what got you *here* in your business will not get you *there*. You're going to need to step up out of your comfort zone if you want to take your business to the next level. And that means learning to delegate.

One of the lessons I've learned is that the sooner you can get comfortable with delegating, the better. Many solopreneurs especially don't delegate soon enough in their business.

I've learnt that the secret to faster scaling is to bring support into your business and delegate or outsource operational tasks as soon as you have:

- a proven offering

- you're making consistent sales.

- And you're receiving great reviews from your clients.

So, what's stopping you from growing your team and delegating?

Well, you might recognise yourself in one of these scenarios:

- Your business has always been your baby and you're afraid of letting go of the reigns of control

- You might want to prove to your team that despite being the boss, you are still prepared, and able, to do anything that you would ask your team to do.

- And next your comfort zone might be keeping you stuck. You might feel safer and happier doing something which you know you can do to perfection, rather than stepping away and into your new CEO role.

- And you might be of the frame of mind where you think it's just quicker to get the task completed yourself, rather than delegate it to somebody else who might not do it to the standard you're used to. I'm guilty of this one!

- And if you don't have a team yet, you might be continuing to do these tactical or operational tasks because you don't yet have the people onboard to support you.

Now, if you do see yourself in any of those examples then don't worry. It's a normal part of your business growth journey and its normal to evolve, grow and find your feet as the leader of your business.

However, you might not see at this stage that stepping away from the smaller tactical things will ultimately help you to grow into effective leader much faster, and it'll give you that headspace to focus more time on building your strategy.

You may even be thinking that you can't afford to delegate, for whatever reason but, the reality is, that you really can't afford *not* to delegate if you want to scale.

So, what I'm going to talk about now is how to identify what to delegate and I'm going to take you through an exercise which I think you'll find really useful.

Understanding What To Delegate

So, when you delegate effectively, you're going to free yourself to work on the more important parts of your business, and focus more strategically.

And leveraging is one of the fastest ways to grow your business beyond 7-figures. So, what you are going to do is leverage the talents and skills of your people, and then you can start to step up your focus on to strategically scaling your business. And you'll be doing that as it's CEO.

And these strategic things may be the things you wanted to already focus on from the get-go – but you haven't been able to, for one reason or another.

But - before you even get started thinking about delegating your workload to your people you need to know what you're actually doing with your time so that you can demarcate your new leadership role from the tasks you are thinking of delegating.

So, I have a little exercise for you which I work through with my own clients to help them to decide, and feel confident in their decisions.

Ok. Here's what to do.

Take some time to make a list of the things you do each day and note down roughly how much time you spend on them.

And when you've done that, I want you to review your list and ask yourself these prompts:

- I want you to think about the tasks that drain your time

- Then think about the tasks that you dislike

- And lastly, the tasks that don't play to your own core strengths.

And a great example of this is, if you spend a good part of the day editing YouTube videos and you feel frustrated because you aren't good at it, and you don't enjoy it, then that's a pretty good sign you could be utilising your time more productively elsewhere.

I'm just going to add in here that people often say to me that I should outsource my web development because I still do this myself. And I will do one day but, I actually find it very mindful and relaxing to do in front of the TV. So, for now at least, its staying as part of my day job and I'm happy about that!

My point here is to create a CEO role for yourself which gives you freedom, happiness, mental wellbeing and plays to your strengths and gives you strategic oversight of your business.

There are no right or wrong ways of becoming a great CEO so if that means you continue to create Canva images in your day because it brings you joy – then go for it!

Ok, lets head back to the list you're working through. Next, ask yourself:

- Which of these tasks can you actually STOP doing? Are they essential to the running of your business – if they are, then could they be streamlined or automated? If you identify tasks that don't need to be done at all, then get rid of them.

- And now think about where the buck stops with you. Which tasks must you do as part of your business owner role? And these are the tasks that you must do, and you cannot delegate them. For example, the buck stops with me to make sure I check my taxes are correct once the accountant has prepared them. I can't outsource or delegate that final check.

- Next, and this is for those of you who are struggling to let go and trust others with key pieces of work. Think about those non-negotiable tasks you feel you can't afford for a member of your team to make a mistake on. So, for example, which tasks need to be right first time for clients? Which tasks are a deal breaker if they are incorrect? Now these tasks will be the ones you'll hold onto and do yourself…and my hope is you will work on letting go, building trust in your team and delegating further down the line. It's OK not to let go right away, so go easy on yourself!

- And lastly, think about the gaps in your knowledge or skill set and the tasks you could outsource to an expert. For example, I have clients I work with every 90 days to help review their business and create a plan for the way ahead. They aren't an expert in strategy yet, its far cheaper for them to outsource this to me than learn years of strategic planning themselves.

And this part of the exercise will take some time so what I suggest is, go through your week or your month as usual and keep a notepad by your side and jot down everything you do whilst you work.

And don't forget to include any quarterly or annual tasks in your list!

Alright – let's move onto the next step in this exercise.

Identify Delegation Options

You're going to do a short sanity check now so I want you to look at your list of tasks again and work out which tasks need to be done by a person, and which routine or repeating tasks can be done by software.

Let's talk about

Delegating Tasks To Software Based Apps

Now I'm not going to dive into apps and software here in too much detail but, there are tons of software apps available which will help you to automate your regular repeating tasks and workflows.

And this usually requires working out what the workflow would be for the tasks you could potentially automate. And then, once the system is set up, neither you nor anyone in your team needs to spend too much time maintaining them. Zapier is an example of an amazing tool which is great for automating workflows and connecting multiple apps together into new workflows. It's a huge time and money saver.

Likewise, if you have adhoc tasks which aren't repeating, think about how these can be automated. So that could be things like your client session bookings, or software for your bookkeeping and accounting. I use Crunch accounting software for all my bookkeeping and accounting needs. It's for UK businesses and its simple and starts from free to use. It's a huge time and money saver.

Kartra is also my go to platform for automations around my sales funnel, my opt-ins and my payment processing.

Another great example, could voice recognition software save you time writing your blog posts or transcribing your podcasts? Otter is a brilliant auto transcriber and again, it's free!

Perhaps team communication tools such as Asana or ClickUp save time and help you track progress of the tasks you delegate to your team members?

So, think about what platforms and software might help free up your role and make your team more efficient.

Now go through your list and find tasks that you delegate from your to-do list to an automated workflow.

I highly recommend doing some research or asking what other people are using if you're not up to speed with the software that's out there.

Ok. So, now you've identified what you can automate, now let's talk about delegating some of your tasks to real people!

And I'm working on the principle here that you already have a team (or someone to delegate to, or someone to outsource to). So, firstly, you need to make sure that you are

Choosing the right person for the task

Of course, you're going to find the majority of tasks on your list probably can't be automated, but remember, you don't have to do them yourself. And also remember here that you are looking to shed as many tasks as you can to free your time to work ON your business and not IN it.

So, consider asking someone else to handle tasks that are slowing you down and those tasks which you've decided not to do yourself. If you don't have permanent or virtual team members, you can potentially easily find the right organisations to outsource your work to.

And it's usually the case that businesses often don't hire full-time employees and instead opt for virtual team members (usually that's so they can maintain flexibility) and there are so many talented people out there with fantastic skills who have chosen to become part of this new virtualized workforce.

And when you put all of these options together to use software, and permanent and virtual team members then you have an incredible talent base that you can tap into to find the right people to take on specific projects or tasks in your business.

And if you're already a multi-six figure business owner then you're probably already outsourcing to an accountant or bookkeeper and have your digital marketing, social media and operational tasks covered.

And don't forget to look at your personal life too. If you need someone to clean your home or do the laundry so that you can concentrate on working in your CEO role, then get people in to support you.

You want to make sure you are supported from all angles in your life whether that's business or personally.

OK. You might also, at this point, be costing up how much it would cost you to hire in that extra support and feeling tempted to avoid investing in bringing people into your business, but this can turn out to be a false economy.

If any of the jobs you do in your business could be done by someone else for a cheaper hourly rate than yours, then you're not working smart. You're basically losing money from your business. So, don't be tripped up by that cost saving mindset.

And once you have the right person (or the right people) to support you, then it's time use the next steps to start driving the results you want from your teams.

I'm going to talk now about

How to Successfully Delegate to Someone Else

This is probably the part that trips so many of you up because successful delegation means trusting a task to someone else and here's the key part, making sure that they know what's expected of them, and when it's expected.

So, effective delegation is not assigning a task to someone else with some sketchy instructions. Remember, your business is only as effective as the people who are in it.

And for those of you who are feeling nervous about letting go of the reigns remember that when you delegate anything in your business, you pass responsibility to someone else to complete your task. But, you still remain accountable for the successful completion of that task.

So, reframe your mindset and tell yourself that you aren't giving up that control really.

OK. I'm going to walk you through the practical workflow for delegating your projects and day-to-day tasks, so that you can free up your time to focus on growing your business.

Step One: Clearly Articulate What You Want To Hand Over

And the tip here is not to just communicate what you are handing over but to be absolutely clear on what you're asking your team member to do for you.

And by that, I mean lay out your clear and specific expectations for the job to be done.

For example, don't say, "I want this piece of sales copy written well and by Friday" but be specific about how you want it laid out, the specific tone of voice to be used, the length of the copy, and so on. You may even give the person examples of copy you've written so they have an example to work alongside.

If it's a piece of project work that you're handing over then I find agreeing that agreeing to regular check-ins with your team member is really helpful, and then you'll know how the project's progressing at regular intervals. It's also useful for them because they can ask more questions if they need to.

For example, for more complex or longer-term projects you might decide to continue to the next stage of the project once you have reviewed the current stage. This style of approach is great because it sets your team up for success, and you retain a level of leadership oversight on the work being completed.

A final tip on setting your team members up for success is to always let your team members know what good looks like – so, what do you consider to be a job well done What does that look like?

So, once you've articulated what needs to be done, it's time to move onto

Step Two: Choose the right person for the task

OK. This one's fairly self-explanatory!

Choose the right person who has the right skills to fit the job at hand.

For example, if you have a current team (whether that's permanent or virtual) look at their existing skills, their level of interest in the task you want to assign, how motivated they are about it, their availability to get it done, and any previous relevant training or past experience they may have had.

And I want to throw in an extra tip here, if you have a new task (or project) which needs to be done for the first time, but you don't have the right skills in-house (and you don't want to outsource it) then consider training the right person to take it on.

The reason I say that is, you'll have a much smoother time to train an existing team member who's already bought into your brand vibe, they know your clients and they already know your way of doing things. It's sometimes easier in the long run to train them from scratch if they have the capability and aptitude to do it.

Think about it this way, it takes a split second to for someone who's unfamiliar with your brand and the way you work to pick up a task, get it wrong and it becomes a costly mistake. So, weigh this up when you are deciding to do the task or project in-house or to outsource to someone new.

I always tell my clients that if a project or task needs to be right first time, or if it could negatively impact your client relationships then in most cases it's better to keep it in-house.

So, a few final tips before we move onto the next step:

- Before you delegate anything to anyone, make sure you know the strengths and limitations of your people.

- For important tasks, don't relinquish your accountability and make them totally responsible. Remember, if you're reassigning critical pieces of work, to work in a way where you retain a level of oversight and you delegate responsibility (and not accountability) for the completion of that work! For some things the buck will need to stop with you.

- If you have a team of mixed skill levels and abilities, avoid delegating in such a way that you're always choosing the same person. If that's happening, then try to understand why this is happening and check that your other team members are having the right support that will enable them to grow.

- Another tip is to make sure your people have all the resources and training they need in advance to get the task done.

- And then if you've agreed to provide a level of oversight to help someone complete a task, then make sure you really do make yourself available!

- And final tip here is once you've clearly laid out all your requirements avoid the urge to micro-manage. Just let them get on with it and come to you if they need to. If you're a micro manager (or want to leave that bad habit behind) then all the more reason to make sure you have clearly laid out your requirements and expectations in advance! There is nothing more demotivating for people to be given a task and have their boss breathing down their necks every 5minutes!

OK. So, once you've made that decision of who is going to manage the work then it's time for

Step Three - Create a simple work plan with that team member

So, basically what you are going to do now is write down what you have decided in steps 1 and 2. And you're doing that to ensure your team member has all the information they need to feel empowered to go away and do the task and complete it successfully.

And depending on the size of the task you might want to create a project brief, or for smaller tasks bullet points on an email, or in your project management tool (like Asana or ClickUp) will do just fine.

So that's

- Articulating clearly the specifics of what needs to be done. And don't forget to include what successful completion of that task or project looks like. If they are doing the task for the first time include instructions (or links to tutorial videos) on how to do the task. Remember you want to set them up for success!

- Then build some context around your request and explain why it's important and what the task is for. That's going to help you keep your team member feeling motivated and bought into completing the task, or project well.

- Remember, delegate whole tasks to one person and avoid splitting the same task between people. And the reason you're doing it that way is to ensure you have one person responsible for completing a task. You don't want to end up in a situation where Jack is saying they thought Jill was doing it and then before you know it, the task becomes unclear, its less motivating and it offers less chance to challenge your team members – especially if it's something new.

- If you're packaging a bunch of tasks into a project which is going to be supported by a team then, again, make sure you choose someone to lead the project as well as assigning the individual tasks out to your team members.

- Then, specify the outcome you're looking for by explaining the results you want to see. So, what does good look like?

- And then, agree on the level of oversight they'll need and when you'll check-in on their progress. So, plan for step-by-step reviews on complex tasks or projects, and hold step by step reviews anyway when you're working with new team members, so you'll know straight away if the task, or project, starts going off the rails.

Ok, let's move onto

Step 4 – Implementing Your Work Plan

So, this this step again is quite self-explanatory. Once the task is delegated and underway then it's time for you to focus on your business and keep yourself on standby to support your team member if they need it.

Don't forget, if it's the first time your team are picking up a task or its it's complex, you might need to factor extra time in your diary to provide guidance and oversight until your team members are feeling confident enough to do it on their own.

And if you've agreed review check-ins for longer pieces of work, then don't forget to schedule these into your diary!

Alright, let's move onto the final step in how master delegation like a CEO!

And that's

Step 5 – Give your team some feedback!

Now, not everyone likes giving feedback but a part of stepping into leadership is giving feedback when a task is completed. So, I want you to give feedback to the person (or the team) on how they did and, if they did a great job – what was it specifically that they did to hit the mark?

Feedback is a fantastic way of building confidence, building personal growth and strengthening your relationships with your team members. So, keep your feedback positive and constructive.

Ask them how they found the task, where they struggled and (if they did) how they might approach that struggle next time.

And don't forget to say thank you too. I've always had feedback from the people who have worked for me that showing my genuine gratitude and saying thank you or "nice work!" was always hugely appreciated. If your team were managing a project on your behalf, then you might want to celebrate with them or buy them lunch or coffees to say thank you!

So, you'll close out this delegation process by reflecting on how things went. And don't forget to reflect on how you felt during the process, especially if you're anything like how I used to be with that fear of handing over those reins to someone else.

Ask yourself, "*is there anything I should change for next time*?" and "*Is there anything I need to work on in my mindset?*"

So, in the podcast we've taken a HUGE deep dive into how to delegate like a CEO. Now, honing your delegation skills does take time and practice but after this episode I hope I've been able to kick start your journey to become an effective delegator and find the confidence to step away from the minutia and into the role as leader of your business.

Have a great day and I'll see you next week!

Until next time.
Lor Bradley