



The Delegation Workbook

**How to Reclaim Your Time, Hand Off the Right Work,
and Finally Build a Business That Doesn't Need You for Everything**

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Letter from James.

Before We Start

Here's the thing about delegation... most business owners know they need to do it. They just don't know where to start. ***I get it. I've been there.***

I spent years doing everything myself. Managing inboxes. Chasing invoices. Scheduling meetings. Updating spreadsheets. Convincing myself that nobody else could do it as well as I could. And the whole time, the actual work - the revenue-producing, business-building, high-impact work - kept getting pushed to "**tomorrow.**" **Tomorrow never came.**

What came instead was burnout, missed opportunities, and a business that couldn't grow because I was the bottleneck holding it all back.

So if you took the **VA Readiness Quiz** and landed here, let me just say: ***you're already ahead of where I was. You're asking the right question.*** You're ready to explore what letting go actually looks like.

This workbook is designed to help you do exactly that. Not with theory or motivation... but with a real framework, real math, and a real plan you can act on this week.

Here's what we'll cover:

- **The Math** - What doing everything yourself is actually costing you
- **The Framework** - How to decide what to delegate (and what to keep)
- **Your Delegation Audit** - An honest look at where your time goes
- **The First 10 Tasks** - Quick wins to hand off immediately
- **Your 30-Day Rollout** - A week-by-week plan to ramp up without chaos
- **The Handoff Template** - So your VA can actually run with it

This is a playbook. Use it. And if you get to the end and want help making it happen... that's what we're here for. Let's get to work.



James Lincoln
Founder & CEO
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Content.

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The Math.

The ROI Reality Check

Most owners don't lose money because they're lazy.
They lose money because they're busy with the wrong work.

The Opportunity Cost Test

Think about one revenue-producing activity you're not doing consistently because of "busy work" - following up leads, asking for referrals, improving close rate, training your team, creating content.

Here's what it looks like when you do the math

10 hrs/week × \$150/hr = \$1,500/week in lost opportunity

That's not just "inefficient." That's expensive.

Over a month, that's **\$6,000**. Over a year? **\$78,000 in revenue you never captured** - not because you weren't capable, but because you were buried in the wrong work.

The Hidden Costs Most People Miss

It's not just the hours. It's the ripple effects:

HIDDEN COST	WHAT IT LOOKS LIKE
Dropped balls	Leads that never got followed up
Slow follow-up	Prospects who went with someone faster
Unsent invoices	Cash sitting on the table
Poor client communication	Clients who feel forgotten
Missed deadlines	Reputation damage, rework
Team confusion	People waiting on you to move
Mental overload	Decision fatigue, burnout, mistakes

A VA doesn't just save time. They reduce operational friction - and friction kills growth.

Your Numbers.

The Opportunity Cost Worksheet

Don't skip this page. Grab a pen. Seeing your own numbers changes everything.

Step 1: What's Your Time Worth?

What do you (or should you) generate per hour when focused on revenue-producing work?

My hourly value is

(Not sure? Take your target annual revenue ÷ 2,000 hours. Example: $\$300K \div 2,000 = \$150/hr$)

Step 2: How Many Hours Per Week Do You Spend on Non-Owner Work?

Think: email, scheduling, file management, data entry, invoicing, follow-up admin, vendor calls, research...

Hours per week on non-owner tasks:

 hrs

Step 3: Do the Math

Hours per week on non-owner tasks:

 hrs

x hourly value /hour = \$ **Weekly opportunity cost**

x 4 weeks = \$ **Monthly opportunity cost**

x 12 months = \$ **Annual opportunity cost**

Step 4: The Comparison

Now compare that to the cost of support:

Your annual opportunity cost (from above) \$

Cost of a VA at \$12/hr × 20 hrs/week × 52 weeks \$ 12,480 / year

Your net gain by delegating \$

The Question That Matters:

Can you afford NOT to delegate?

The Framework.

The Simple Delegation Rule

If it doesn't require your judgment, your relationships, or your expertise — it shouldn't require your time.

That's it. That's the rule.

Most business owners overcomplicate delegation because they think they need to hand off everything at once... or nothing at all.

The truth is, there's a clear line between Owner Work and VA Work. Here it is:

OWNER WORK (KEEP THIS)	VA WORK (DELEGATE THIS)
Strategy & vision	Inbox triage & email management
Sales calls & closing	Scheduling & calendar management
Client relationships	Follow-up sequences
Big-picture decisions	Data entry & CRM updates
Revenue-generating activities	File management & organization
Hiring & leadership	Research & vendor calls
Business development	Invoicing & admin

Here's the test for any task:

Ask yourself three questions:

1. Does this require my judgment to complete? (Not just my preference — my actual expertise.)
2. Does this require my relationship with the client/partner/vendor?
3. Does this require knowledge only I have that can't be documented?

If the answer to all three is no — that task doesn't belong on your plate.

Most business owners can name 5–10 tasks immediately that don't require them. That list is your delegation starting point.

Delegation Audit.

Where Does Your Time Actually Go?

This is the exercise that changes everything. Be brutally honest - nobody's grading this but you.

Part 1: Map Your Week

Write down every recurring task you do in a typical week. Then mark each one.

Task	hrs/wk	Owner work?	Could a VA Do This?
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Part 2: Add It Up

What do you (or should you) generate per hour when focused on revenue-producing work?

Total hours mapped above	<input type="text"/>	hrs/week
Hours marked "NOT Owner Work"	<input type="text"/>	hrs/week
Hours marked "A VA could do this"	<input type="text"/>	hrs/week

Part 3: The Honest Question

Look at the hours you just mapped. How many of those tasks are you doing because they genuinely need you - and how many are you doing because you haven't let go yet?

Inside the Playbook.

First 10 Tasks to Delegate

Quick-win tasks that immediately save time, reduce mental load, and tighten follow-through.

1 Inbox Triage + Daily Priority Summary

- Sort, label, archive, flag
- Pull out anything that needs your decision
- Deliver a 5-bullet daily summary:
Urgent / Waiting / Needs Reply / Follow-up / FYI

✓ **Success:** You only see what actually needs you.

6 Client Onboarding Checklist + Welcome Packet

- Intake forms, questionnaire, kickoff scheduling
- Collect logins/files via a secure method
- Confirm expectations, next steps, and timelines

✓ **Success:** New clients feel taken care of immediately.

2 Calendar Management + Scheduling

- Book meetings, confirmations, reschedules
- Add agendas + links, handle time zones
- Protect focus blocks and travel buffers

✓ **Success:** No back-and-forth, no calendar chaos.

7 Document Management + File Organization

- Create folders, name files consistently
- Save attachments from email into the right place
- Keep your "where is that file?" problem gone

✓ **Success:** You can find anything in 10 seconds.

3 Follow-Up (Leads + Prospects)

- "Just checking in" follow-ups
- Nudge sequences after calls, quotes, proposals
- Re-engage old leads monthly

✓ **Success:** More replies and closes without you babysitting it.

8 Recurring Admin (Weekly/Monthly Routines)

- Weekly agenda prep (your meetings, client calls)
- Monthly invoice reminders
- Report collection (KPIs, sales numbers, expenses)
- End-of-week recap draft

✓ **Success:** Your business runs on rhythm, not memory.

4 CRM Hygiene

- Update stages, tags, contact info
- Log notes and outcomes
- Create tasks so nothing drops

✓ **Success:** Pipeline is real, not imaginary.

9 Accounts Receivable Support (Light Collections)

- Send invoice reminders
- Confirm receipt and payment timing
- Escalate only the problem accounts to you

✓ **Success:** Cash comes in faster with less awkwardness.

5 Quotes / Proposals — Assembly + Formatting

- Build from a template
- Add scope notes, dates, pricing tables
- Send for your final approval

✓ **Success:** You review and send - you don't build.

10 Simple Research + Vendor Coordination

- Compare tools, gather pricing, shortlist options
- Book travel, coordinate repairs, order supplies
- Call vendors to get updates and timelines

✓ **Success:** You stop wasting prime brainpower on logistics.

Your Top 5.

Which Tasks Are You Handing Off First?

Look at the 10 tasks on the previous pages — plus anything you added in your Delegation Audit. Pick the 5 you'd hand off first. These are your quick wins.

	Task I'm Delegating	Why This One First?	hrs/wk
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total hours I'd reclaim per week:

hrs

What would I do with that time?

*That answer right there? That's your freedom.
That's what a VA makes possible.*

The Rollout.

Your 30-Day VA Rollout Plan

Don't dump everything on Day 1. Ramp up task by task - one new handoff every 2–3 days.

WEEK	Focus	Tasks to Hand Off
WEEK 1	Build Trust	Inbox triage & daily summary, calendar management, file organization. Start with low-risk, high-frequency tasks so you both build confidence.
WEEK 2	Add Follow-Through	Follow-up cadence (leads & prospects), CRM hygiene, recurring weekly admin. Your VA starts owning processes, not just tasks.
WEEK 3	Revenue Support	Quotes & proposals assembly, client onboarding checklist, accounts receivable. Now they're directly supporting your pipeline.
WEEK 4	Full Rhythm	Research & vendor coordination, refine all workflows, establish a weekly check-in cadence. You're now operating as a team.

Check-In Cadence

WEEK	Check-In Frequency	Tasks to Hand Off
WEEK 1	15 min daily	Build the relationship, catch issues early
WEEK 2	15 min every other day	More trust, fewer questions
WEEK 3	2x per week	They're running, you're reviewing
WEEK 4	1x weekly sync	Full rhythm — you're a team now

PRO TIP

The goal isn't micromanagement - it's building a feedback loop that fades into rhythm. By Week 4, a single weekly sync should be enough.

Your Rollout Plan.

Customize Your 30 Days

Using your Top 5 tasks and the rollout framework, map out your own first 30 days.

Week 1: Build Trust

My focus: Get comfortable. Hand off the easiest, most repeatable tasks.

Task I'm Delegating	Tools They'll Need	How I'll Brief Them
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Week 2: Add Follow-Through

My focus: Let them own a process end-to-end.

Task I'm Delegating	Tools They'll Need	How I'll Brief Them
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Week 3: Revenue Support

My focus: Tasks that directly impact the pipeline and cash flow.

Task I'm Delegating	Tools They'll Need	How I'll Brief Them
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Week 4: Full Rhythm

My focus: Refine, optimize, and lock in the weekly cadence.

What's Working Well	What Needs Adjusting	My Weekly Sync Day/Time
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

The Template.

How to Hand Off a Task

The clearer your handoff, the less back-and-forth.
A VA can't read your mind, but they can follow a good brief.

Copy this template for every task you delegate. Fill it in once, and your VA can run it on repeat.

The Task Brief Template

FIELD	What to Write
Task	What is it? (Be specific.)
Goal	What does "done well" look like?
Steps	Walk through it 1-2-3. Include screenshots if helpful.
Tools Needed	What software, logins, or access do they need?
Frequency	Daily? Weekly? Monthly? One-time?
Questions? Ask via:	Slack? Email? Text? Set the expectation.
First Check-in	When will you review their first attempt?

Example: Inbox Triage

FIELD	What to Write
Task	Inbox triage + daily priority summary
Goal	I only see emails that need my decision. Everything else is handled.
Steps	1. Check inbox at 8am and 2pm. 2. Label: Urgent / Reply / FYI / Archive. 3. Send me a 5-line summary in Slack by 9am.
Tools Needed	Gmail (shared access), Slack
Frequency	Daily (weekdays)
Questions? Ask via:	Slack DM — flag anything ambiguous
First Check-in	End of Day 2

Most delegation fails not because the VA isn't capable — but because the handoff was vague. Invest 10 minutes in a clear brief, and you'll save hours of back-and-forth.

Your 1st Handoff.

Write Your Own Task Brief

Pick the #1 task from your Top 5 list and write the brief right now. Don't overthink it - just get it down. You can refine it later.

Task

Goal *(what does "done well" look like?)*

Steps *(walk through it 1-2-3)*

Tools Needed

Frequency

Daily Weekly Monthly Monthly Other: _____

Questions? Ask via:

Slack Email Text Call Other: _____

First Check-in *(when will you review their first attempt?)*

If you can fill this out for one task, you can fill it out for all of them. That's how delegation becomes a system — not a one-time event.

What's Next.

You've Got the Playbook. Now Let's Make It Happen.

You've done the math. You've mapped your time. You've picked your first tasks and built a brief. That's more than most business owners ever do.

But here's what I've learned after 25 years and 2,000+ businesses:

Knowing what to delegate and actually doing it are two different things.

The gap between "I know I need help" and "I have help" is where most people get stuck. They put the workbook down. They go back to the inbox. And next month looks exactly like this one.

It doesn't have to.

LINX Leverage - Skilled Support, Starting at \$12/hr

We match you with trained virtual assistants who can handle every task in this workbook - and more. No long-term contracts. No bloated packages. Just the right support at the right level.

SUPPORT LEVEL	Starting at	Best For
Basic Support	\$12/hr	Admin, email, calendar, CRM, scheduling, data entry
Expert Support	\$15/hr	Bookkeeping, social media, marketing, HR, onboarding
Specialized Support	\$40/hr	Web dev, automation, CRM customization, advanced creative

Or - If You Need More Than a VA

If your Delegation Audit revealed deeper issues — no systems, no processes, no leadership pipeline - a VA alone won't fix that. That's where our consulting and advisory services come in.

LINX Connect - Strategic advisory, starting at \$1,500/mo

LINX Connect Plus - Advisory + execution support + tools, starting at \$2,500/mo

We help you build the business that doesn't need you for everything.

Your business is ready. Are you?

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