

# Delegation Worksheet

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Use this worksheet to reflect on your current responsibilities and explore ways to free up time for what matters most.



**Remember:**

Doing less starts with knowing what you don't need to do yourself.

## Activity 1: Identify Tasks to Delegate or Outsource

Review your notes or [Prioritization Worksheet](#).

What items on your to-do list are urgent but do not align with your long-term goals or values?

### Delegation:

Think about which task someone else on your team, household, or network could take on. These might be tasks that don't require your unique expertise or that you could share your knowledge with a temporary time investment.

### Outsource:

Outsourcing might involve hiring external help or completing a service swap. Usually these tasks require specialized skills or take up too much of your time. Consider freelancers, virtual assistants, or service providers to fill this need.

Examples:

- Bookkeeping or Accounting
- Organizing family or organizational events
- Household chores

Reflection Prompt:

- What tasks do you currently handle that could be done by someone else?
- What tasks drain your energy or fall outside your zone of genius?
- Who could you delegate or outsource these tasks to?

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## Activity 2: Identify Tasks to Automate

Automation uses tools and technology to handle repetitive tasks. Explore built-in features in your existing apps, or consider tools like Zapier, Power Automate, or scheduling software.

Examples:

- Email filtering and auto-replies
- Social media scheduling
- Recurring calendar reminders

Ask yourself:

- What tasks do you repeat daily or weekly?
- What tools do you already use that offer automation features?
- Do you have any error prone processes that can benefit from standardization?

Write down your reflections:

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The **Eisenhower Matrix** is just one prioritization framework you can use to identify tasks to eliminate or postpone.

## Action Plan:

Review and reflect on your responses. Choose one task to delegate, one to outsource, and one to automate.

- Task to Delegate: \_\_\_\_\_
- Task to Outsource: \_\_\_\_\_
- Task to Automate: \_\_\_\_\_

Create and document your plan of how you will implement these changes. Include timelines and dates.

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