

The Delegation Clarity Tool

What to Hand Over to Your VA

A quick, practical worksheet to help you identify the tasks you can delegate so you can focus on the work that actually grows your business.

INSTRUCTIONS

1. **List your weekly tasks.** Big tasks, small tasks, everything in between.
2. **Score each task:**
 - a. **Skill:** How good am I at this?
 - b. **Desire:** How much do I want to do this?

Rate 1-4, with 4 being very high skill/desire and 1 being very low skill/desire.
3. **Ask:**

Does this task require my expertise?
Yes / No
4. **Place each task into the Delegation Matrix.** This should take 5–10 minutes and gives you instant clarity.
5. **Review the Delegation Snapshot** to identify the tasks to hand over.
6. **Book a Delegation Power Hour.** In 60 minutes, we'll identify exactly what's draining your time and build your first delegation plan together.

TASK PROMPTS

- ☐ Inbox management
- ☐ Calendar coordination
- ☐ Client onboarding
- ☐ Social media content
- ☐ Research
- ☐ Document formatting
- ☐ Website updates
- ☐ Slide decks
- ☐ Policy documents
- ☐ Invoice chasing
- ☐ Follow-up admin
- ☐ File organisation
- ☐ Content scheduling
- ☐ Travel planning
- ☐ Lead tracking
- ☐ Template creation
- ☐ Other: _____

(add more as needed)

SR Pro VA

Your Professional Virtual Assistant

Thorough Assistance. Thoughtful Execution.

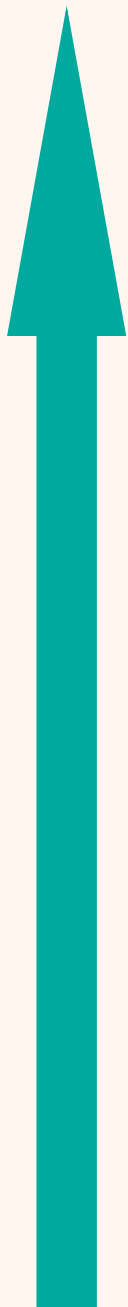


Your Task List

TASK	SKILL (RATE 1-4)	DESIRE (RATE 1-4)	DOES THIS TASK REQUIRE MY EXPERTISE?

Next - drop each task into the Delegation Matrix.

The Delegation Matrix

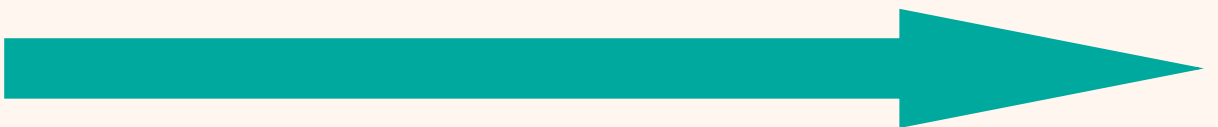


HIGH DESIRE

LOW DESIRE

LOW SKILL

HIGH SKILL



Delegation Snapshot



Approximately how many hours per week do you spend on tasks in the 'Let-Go' and 'Strategic Offload' sections?

- ☐ Less than 2 hours
- ☐ 2-5 hours
- ☐ 5-10 hours
- ☐ 10 hours+

NEXT STEPS

Book a Delegation Power Hour and leave with:

- Your first tasks to hand off
- A personalised delegation plan
- A clear understanding of where your time is best spent