

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.

Step 1 - List your regular tasks. Weekly, monthly, occasional, big tasks, small tasks and everything in between. Use the prompt table to assist you.

Your Task List

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

Note: Keep tasks specific. When you group things together (e.g., "client admin"), you may miss opportunities to delegate individual parts that don't need your time.

SR Pro VA

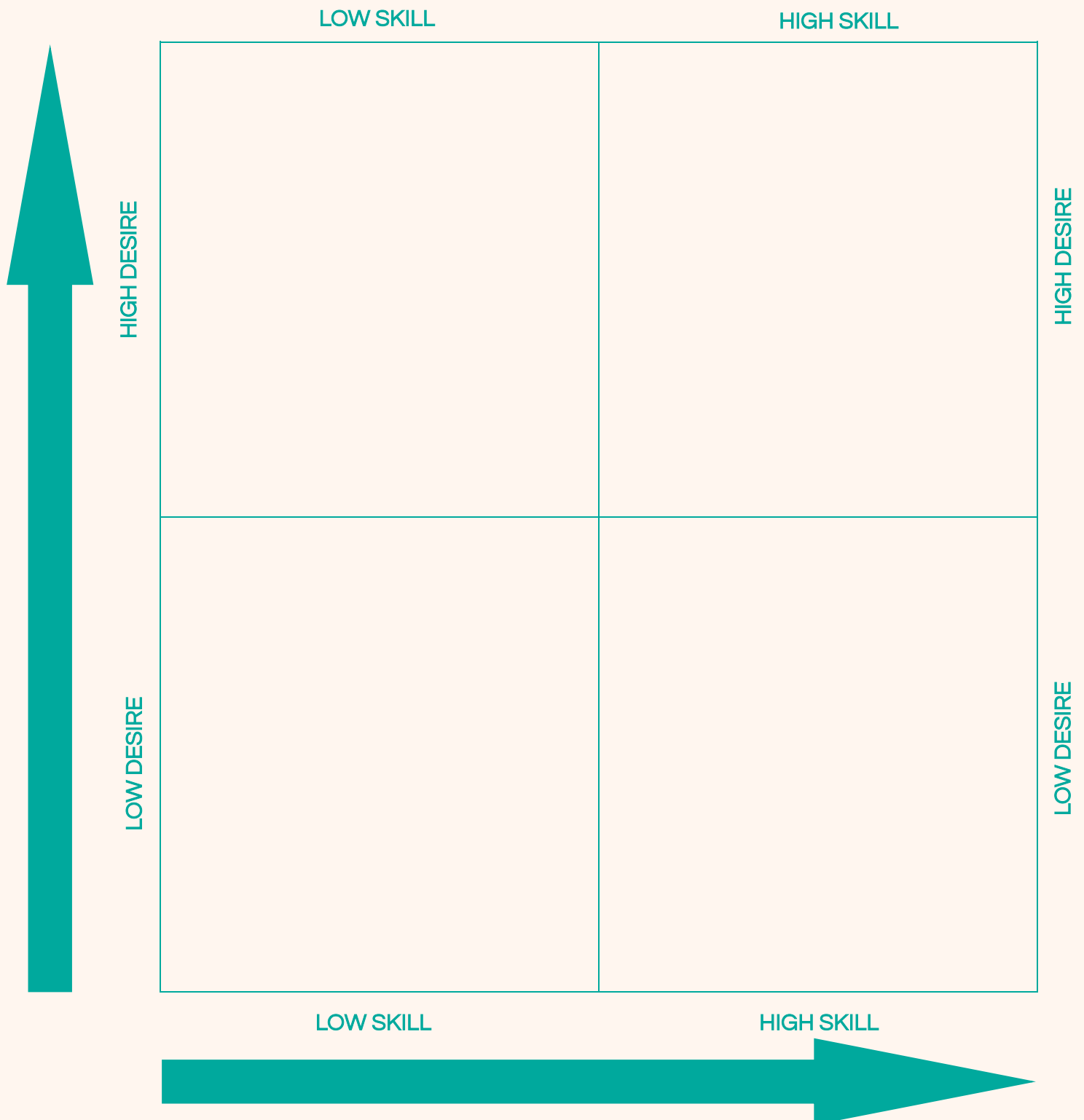
Your Professional Virtual Assistant

Thorough Assistance. Thoughtful Execution.



The Delegation Matrix

Step 2 – Place each task in the quadrant. As you add each one, choose Low or High for Skill and Desire by asking: how good am I at this, and how much do I want to do it.



Delegation Snapshot

Step 3 – Review your results. Identify the tasks you can delegate now, delegate soon, or keep.

THE CO-CREATE ZONE Fun, but not efficient. Delegate the setup or heavy lifting.	YOUR CORE WORK This is your magic. Keep it - with VA support around the edges.
THE LET-GO TASKS These tasks drain you and take too long. Delegate immediately.	THE STRATEGIC OFFLOAD You do it well, but it zaps your energy. Delegate strategically.

Step 4 – Estimate your time drain. How many hours each month are spent on ‘Let-Go’ and ‘Strategic Offload’ tasks?

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

Step 5 - Book a Delegation Power Hour

Together, we'll turn your results into a practical plan that frees up your time and energy.

[BOOK HERE](#)