RISK FREE DELEGATION

How to Hand Off Important Parts of Your Business Without Risking Customers, Profit, or Growth

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HOW TO HAND OFF IMPORTANT PARTS OF YOUR BUSINESS WITHOUT RISKING CUSTOMERS, PROFIT, OR GROWTH

As a business owner, you know how hard it is to hand over even the simplest responsibilities. Tasks you can do with your eyes closed…but can't trust anyone else to do. Things like:

- Providing an accurate estimate on client project (without needing to explain to your wife that you can't take a paycheck this month because you miscalculated costs)

- Remembering when you need to call back your prospects (and getting money in the bank instead of a 1-star review because you didn't return the call)

- Filing that mission-critical piece of paperwork (instead of a government agent showing up at your door for an audit you're not prepared for)

While the business is small, you manage to stay on top of these tasks. As it grows, however, you begin sinking into a swamp of responsibilities you know you should be able to hand off. Yet you can't seem to figure out how.

If you're like me, that doesn't mean you stop trying.

Trouble is, your team members don't see the big picture of everything going on in the business. They make short-sighted decisions costing hundreds (or even thousands) of dollars.

They lack your years of industry and trade knowledge. Your projects stall as your team members wait for answers to simple questions. While you're busy closing a deal, their downtime siphons profits from already-too-tight margins. When they can't deliver on time, you burn trust with your most valuable customers.

The time you *hoped* you'd save by getting help? You're now spending that time untangling these knotty situations. Instead of taking the day off, you're spending your Saturday getting your team out of another mess.

You feel trapped between two choices. You can bury yourself under the growing weight of the responsibilities. Or you can sacrifice the reputation of the business you've been so proud to build.

What's the path out of this swamp?

YOU MIGHT BE CLOSER THAN YOU THINK

If you've tried to hand off an important part of your business, only to fail, you're not alone.

Many business owners find themselves trapped in a cycle. First, they try to delegate. Then, they're compelled to take back a botched responsibility.

However, you might be closer than you think. Businesses that can grow and scale rely on three critical building blocks.

- First of all, you must have a **strong core business.** You cannot build a mansion from a house of cards, nor can you delegate your own guesswork. The core business doesn't have to be perfect. Yet it must be a weight-bearing, profit-generating business.

- Second, you must **surround yourself with an outstanding team.** If you want to grow and scale, you can't rely on micromanaging your team. This doesn't mean disengaging. Yet it does mean hiring excellent team members to allow you to do what you do best--to lead and grow the business. Many times, business owners too quickly assume they've hired the wrong people. Instead, they're lacking the final critical building block.

- Finally, you must **support your team by providing the systems they need to grow the business.** Many business owners never master this skill, assuming instead they've simply hired the wrong people. The few who master it can create businesses that provide predictable, repeatable results. They build healthy, thriving teams. They eliminate many of the personnel problems that plague their competitors. They enjoy a business that no longer sucks them into a swamp. Rather, it brings freedom and control into their lives.

This final building block is the secret that will enable your company to grow and scale. You may already have heard how to do it, yet found it difficult to do. Let's take a look at what it actually takes.

MAKING IT EASIER TO WIN THAN TO FAIL

The moment your employee steps in the door, you must find a way to make it easier for them to win than to fail. From the first ring of your phone to the final delivery, they have dozens of things to keep track of.

- The salesperson must check his voicemails. He must be on time for his appointments. He needs to provide accurate quotes for the customers.

- The people in fulfillment must manage the inventory. They need to deliver on time, every time. They must meet or exceed each customer's expectations.

- The office staff need to make sure they receive invoices from all customers. The must deposit all checks into the bank, then track all income and expenses.

Even the best-intentioned, most qualified people make mistakes. Your salesperson stays late to close a deal and rushes out of the office. The next morning, he forgets to process the paperwork from the sale.

Your secretary drives to the bank with the daily deposit. On the way, she receives an emergency call from school that her son is in the emergency room with a broken arm.

These things happen--not because your staff is negligent or irresponsible. It's because of their loyalty and dedication that these mistakes happen. Your salesperson stays late because he's committed to the company's success. Your secretary gives you the same fierce commitment at work that she gives her family at home.

That's why it's important to **make it easier for your team to win than to fail.** You need to understand the process--the steps they take to do their work.

Processes that work always follow three specific traits:

- **They must have simple, built-in accountability.** Your secretary never intended to leave the bank bag under the front seat of her car. How could you make it easy for another team member to notice if a deposit has been missing for a few days?

- **They must be easy for another team member to follow.** Document the specific steps for making a deposit. This way, another team member can meet your secretary at the hospital and pick up the money bag. With the right process, they know they're doing the job right...even if they've never done it before.

- **They must be easy to follow and easy to change.** Processes only work when they fit the role like a glove. They must be easy to change without red tape or bureaucracy.

Outstanding employees do not fall short because of incompetence. They fail because they lack the support of proper processes. They also lack the systems they need to continue using them. Many business owners find themselves frustrated over their team's poor performance, not realizing they lack the support they need to do their job. These processes and systems provide your employees with accountability, structure, and training.

The idea is simple. Execution is hard. Your team members don't always understand your instructions the way you meant them. They don't always catch the details you tried to emphasize.

What does it take to make this happen?

THREE STEPS TO A RISK-FREE HANDOFF

STEP 1: ▶ FIND THE BEST PLACE TO FOCUS

Start the hand-off by finding the place with the greatest payoff.

You might choose to focus on your own responsibilities. To reclaim hours from your week, focus on handing off tasks that take a lot of your time. If you need to reduce stress, focus on handing off tasks that are hard for you but easy for your team.

If you're working with one of your teams, look for these places within their responsibilities. You might help your salespeople to better track their leads or manage their accounts. You might help your team simplify their work so they can fulfill more orders. You might make it easier for your administrative staff to get their work done. This way, you can reduce your overhead and make it easier to grow and scale.

When choosing your focus, ask yourself specific questions. How much time will this free up? How much opportunity will this create for future growth? How much time or effort will it take to complete the handoff?

As business owners, we often misjudge our situation because we're so close to it. We assume something is much easier (or much more difficult) than it actually is. It's important to rely on an outside perspective. You want someone else to ask the right questions. They should challenge your assumptions and probe for the best solution.

STEP 2: ▶ UNDERSTAND WHAT YOUR IDEAL EMPLOYEE REALLY NEEDS TO KNOW TO DO THEIR WORK WELL

You've pinpointed the *single most important* responsibility you need to hand off.

Now you must clarify what your ideal employee *really* needs to know to do it well. What information do they need to track? What assumptions do you have about what they need to do? How do they need to do it? When do certain things needs to happen?

Once again, to make this exercise more powerful, find someone to help you. They'll uncover hidden assumptions you have about the task at hand. You'll find their perspective enlightening, especially if they're unfamiliar with the process.

We also encourage business owners to use a storytelling method. Unfortunately, we can't cover this method in this article. In brief, tell the story of what unfolds when everything is going the right way. This allows you to easily organize your thoughts as you brainstorm. It highlights assumptions in the process. It creates a process that's relatable and human, rather than technical and confusing.

BUILD THE TOOLS TO HELP THEM WIN

You know exactly what your employee needs to know and do. Now, you must build the tools that will set them up for success. This means providing them with accountability, structure, and support.

You might provide **accountability** by tracking and reminding them of critical deadlines. You might provide transparency of their work to the rest of the team. You might identify a few key metrics to review in a daily or weekly meeting.

You might provide **structure** with checklists that prevent absent-minded mistakes. You might set up reminders for important follow-up. You might create forms to make sure you get all the information you need from every phone call. You might set up paper or electronic files for your customers or jobs.

You might provide **support** by documenting and training them how to do their job well. You might automatically send weekly reports by email. You might enable them to enter sales information on the road. You might help them find the most efficient delivery schedule. You might help them predict a job's exact completion date. You might protect them from double-entry between two software systems.

You might choose a paper system, retail software, or a custom software solution. As you compare your options, make sure the tool will allow future growth.

If you choose a software solution, make sure the software meets your business needs. If you have several tools, make sure they all integrate well. Don't get caught paying subscriptions for several solutions that can't connect. Make sure your software vendor can support the software as your business grows.

Help your team members start using these tools. Guide them to follow the process. Invite feedback from them on changes you'd like them to make. Many times, you'll discover a few simple tweaks that provide a lot of value, making your tools more effective and powerful. This will ensure the handoff will be a success.
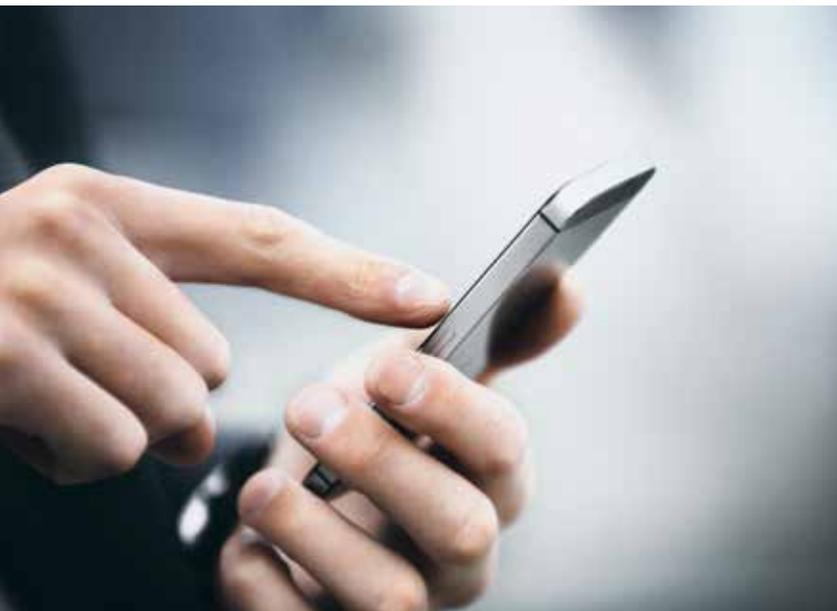
FINALLY, GROW AND ADAPT

Congratulations! You've now completed a Risk-Free Handoff. You finally have time and space to focus on your most important priorities. Where do you go next?

You might choose to take a breather. You might want to continue scaling with the process you have in place. You might choose to do another Risk-Free Handoff for other responsibilities.

Regardless, the most important part of the Risk-Free Handoff is this: your choice. This handoff gives you the freedom to choose where to direct your focus and time.

With time, many business owners find that their team member can do their work better than them. The work gets done without any of the headaches they'd faced before!

WHAT OBSTACLES ARE BIG ENOUGH TO STOP YOU?

If you choose to implement the proper processes and systems in your business, that could be the **single most important thing** you do this year. As a business owner, you know that anything that important will bring resistance.

Business owners fail to implement systems for a number of reasons.

- Beginning by systematizing everything at once, but having their attempts crumble under the overwhelming size of the task.
- Trying to implement from the top-down, but failing to understand their team members' needs or getting their team's buy-in.
- Consulting a business coach who understands their processes yet lacks the deep understanding of how software can uniquely support them.
- Hiring a developer who can code any tool they need, yet who doesn't understand their business deeply enough to ensure the processes, systems, and software match what their business really needs.
- Choosing software they think is right for them, but eventually requires adjusting their processes to fit the tool.

Most importantly, many business owners never follow through because of the whirlwind of activity in their business. This very moment, your phone might ring. You'll pick up the phone, set this paper down, and **promise yourself** to get back to it someday.

Will you keep that promise to yourself?

THE MOST IMPORTANT THING YOU COULD DO THIS YEAR

If you implement the proper systems and processes in your business, you will free up your time, increase your profitability, and enable your growth--while improving the customer experience. This could be the most important thing you do in your business this year.

The surest, fastest way to make this happen is getting the help you need. To discuss whether this is a fit for your business, let's schedule a free, no obligation 30-minute "Risk-Free Handoff" strategy call.

Here's what you can expect in those 30 minutes:

- We'll get a **clear picture** of what your business will look like when it's running the way you want to.
- We'll determine **what needs to change** to make the ideal outcome become a reality.
- We will **decide together** whether systematizing your processes is a good fit, and what the right toolset is for you.

To schedule your call, send an email to handoff@multiplysoftware.com or call (719) 888-2424. We will find a time that works for both of our schedules.

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