

THE ENTREPRENEUR'S DELEGATION TOOLKIT

Keystone Collective

A practical resource for solopreneurs and entrepreneurs.



INTRODUCTION

Welcome to the Keystone Collective: Entrepreneur's Delegation Toolkit Workbook.

This resource is designed to help entrepreneurs like you delegate effectively, freeing up time for strategic leadership and growth.

Inside you'll find reflection prompts, exercises, templates, and action steps to guide your delegation journey.

Use this workbook as a tool for clarity, confidence, and empowerment in your business.

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SECTION 1

Delegation Mindset & Readiness

OBJECTIVE:

Shift from 'doing it all' to 'leading through others.'

REFLECTION PROMPTS:

- What beliefs do I hold about delegation?

- What fears or hesitations do I have?

EXERCISE: DELEGATION MINDSET QUIZ

Rate your agreement with the following statements:

- I trust others to complete tasks well.

Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree

- Delegation helps my business grow.

Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree

- I feel confident assigning tasks to others.

Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree

ACTION STEP:

Write your new delegation mantra (e.g., 'I lead by empowering others').



SECTION 2

Task Audit & Delegation Matrix

OBJECTIVE:

Identify what to delegate and to whom.

TASK AUDIT:

Use the table below to list tasks you've performed recently. Categorize them based on their nature and impact.

Task	Category (Admin, Creative, Strategic, Technical, etc.)	Impact Level (High, Medium, Low)
E.g. Schedule social media posts	Creative/Marketing	Medium



SECTION 2

Task Audit & Delegation Matrix

DELEGATION MATRIX:

Use the matrix below to decide what to delegate, automate, eliminate, or keep.

	Urgent	Not As Urgent
Important	KEEP	AUTOMATE
Not As Important	DELEGATE	ELIMINATE

EXERCISE:

Categorize 10 recent tasks using the task audit table and delegation matrix.

ACTION STEP:

Choose 3 tasks to delegate this week and note them below.

- 1.
- 2.
- 3.



SECTION 3

Role Clarity & SOP Builder

OBJECTIVE:

Create clarity for your team and systems.

ROLE DEFINITION WORKSHEET:

Use the table below to define key roles in your business and their responsibilities.

Role Title	Primary Responsibilities	Skills Required	Person Assigned



SECTION 3

Role Clarity & SOP Builder

STANDARD OPERATING PROCEDURE (SOP) TEMPLATE:

Use this template to document recurring tasks for delegation. A Sample SOP Example is provided on the next page for reference.

SOP TITLE:

PURPOSE:

(Describe the purpose of this SOP.)

SCOPE:

(Define what is covered and who is responsible.)

PROCEDURE STEPS:

- 1.
- 2.
- 3.

TOOLS NEEDED:

(List any tools or platforms required.)

EXPECTED OUTCOME:

(Describe the result of following this SOP.)

REVIEW DATE:

(Specify when this SOP should be reviewed.)



SECTION 3

Role Clarity & SOP Builder

SAMPLE (SOP) EXAMPLE

SOP TITLE:

Weekly Social Media Scheduling

PURPOSE:

Ensure consistent posting across all platforms.

SCOPE:

Covers scheduling posts for Instagram, LinkedIn, and Facebook.
Assigned to Marketing Assistant.

PROCEDURE STEPS:

1. Review content calendar.
2. Create posts in Canva.
3. Schedule posts using Buffer.

TOOLS NEEDED:

Canva, Buffer, Content Calendar Spreadsheet

EXPECTED OUTCOME:

All posts scheduled by Monday 10 AM for the week.

REVIEW DATE:

First Monday of each month.



SECTION 4

Communication & Accountability

SAMPLE DELEGATION SCRIPTS:

- “I would like you to take ownership of this task. Here is what success looks like...”
- “Can you take this on and let me know if you need any support?”
- “This is a great opportunity for you to lead. Here is the context...”
- “I trust your judgement on this. Please keep me updated on progress.”
- “Let us clarify expectations and outcomes before you begin.”

FEEDBACK LOOP PLANNER:

1. Set clear expectations at the start.
2. Schedule regular check-ins (daily, weekly, or bi-weekly).
3. Ask open-ended questions:
 - a. What is going well?
 - b. What challenges are you facing?
 - c. What support do you need?
4. Provide constructive feedback:
 - a. Be specific and timely.
 - b. Focus on behaviors and outcomes.
5. Celebrate wins and progress.

WEEKLY CHECK-IN TEMPLATE:

- What were your top accomplishments this week?
- What tasks are still pending?
- What blockers or challenges are you facing?
- What support or resources do you need?
- What are your priorities for next week?
- Any feedback or suggestions for improving delegation?



SECTION 5

Delegation Planner

WEEKLY DELEGATION PLANNER:

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

PRIORITIZATION PROMPTS:

1. Which tasks are most aligned with my strategic goals?
2. What tasks can only I do?
3. What tasks drain my energy and could be delegated?
4. What tasks are repetitive and could be systematized?
5. What tasks require immediate attention vs. long-term planning?

REFLECTION QUESTIONS:

1. What did I delegate this week?
2. How did my team respond?
3. What worked well in my delegation process?
4. What could I improve next week?
5. What will I commit to delegating next?



SECTION 6

Contact Us

READY TO FOCUS ON WHAT ONLY YOU CAN DO?

Let's delegate the rest.

Keystone Collective is committed to providing tailored solutions that help entrepreneurs operate more efficiently and achieve their business goals.

Ready to take the next step? Contact us to schedule your initial consultation and let's discuss how we can help you achieve your goals.

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