

What Can Come Off Your List?

A practical starting point for deciding what to delegate, simplify, automate, or keep.

Start with the work, not the job title

You do not need a perfect task list before asking for support. Start by noticing the work that keeps returning, interrupts your focus, or waits because you never have time for it.

1. Make a quick inventory

Look back over a normal week. Write down recurring tasks, unfinished follow-ups, and work you keep putting off. Include the small jobs: together, they can take up a lot of attention.

2. Give each task a next step

Delegate: Someone else can do it with the right context and access. Example: prepare a newsletter draft or organize project updates.

Simplify: Reduce unnecessary steps first. Example: use one intake form instead of collecting details across several email threads.

Automate: A clear, repeatable rule can handle part of it. Example: a reminder when a task is due, tested before relying on it.

Keep: Your judgment, relationship, or approval is essential. Example: a final pricing decision or a sensitive client conversation.

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CHOOSE YOUR STARTING POINT

Find your first handoff

Pick one useful task you can explain and review. You can build from there.

Which of these keeps landing on your list?

Inbox follow-ups | Calendar coordination | Client onboarding | Project updates | File organization | Canva graphics | Social post preparation | Newsletter drafts | Travel details | Routine record updates | SOP documentation | Software setup

3. Choose one task to hand over

Look for something recurring, reasonably predictable, and easy to check. Do not begin with the most sensitive or complicated work just because it is frustrating.

The task I want help with:

Why this task? What would getting it off my list make room for?

What does a good result look like? Include the format, deadline, and an example if you have one.

Make the benefit concrete

Estimate how often you do the task and how long it usually takes. Treat this as a planning estimate, not a promise of time saved. Allow time to explain the work and review the first results.

Frequency: _____ Time each time: _____

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USE THIS HANDOFF BRIEF

Make it easy to get started

A few clear details can prevent a lot of back-and-forth.

Outcome: What should be ready when the task is complete?

Inputs: Where are the source files, examples, templates, and instructions?

Timing: When is it due, and how often does it repeat?

Access: Which tools are needed? Use individual invitations and appropriate permissions rather than sharing passwords.

Boundaries: What can be drafted or updated, and what needs your approval?

Review: Who checks the result, and where should questions go?

My handoff notes:

After the first round

Review the result together. Clarify what was missing, update the instructions, and agree on the next run. A useful handoff becomes a repeatable process, not a one-time explanation.

Want help choosing where to start?

Bring this worksheet to a discovery call with The Sterling Desk. We can talk through your priorities and a practical starting point.

Book a 15-minute introduction | Book a 30-minute conversation