The Freelancer's Guide To Delegating Your To Do List

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Preface

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What to expect from this guide

You're reading this guide because you're asking one very important question: **how do I get more things off my to-do list**?

As a freelancer or consultant, time is your most precious resource.

If you bill hourly, there is a _literal cost_ to every hour you spend doing something other than a client project. If you bill by the day, week, or project, then you want to minimize the time it takes to get your client to the outcome they desire.

This guide boils down everything that you need know to get started delegating projects off of your to do list into a short, actionable guide with specific advice for you to follow.

When you finish reading this guide, you'll have a firm understanding of:

- Why delegating projects is one of the three ways you can take projects off of your to do list

- What types of projects you can identify and delegate (and what you should refrain from delegating)

- What to do to get started delegating tasks and projects

The Three Paths: Automation, Delegation, or Elimination

When you have a project on your to do list, you have three options:

- Is this something you can **automate** using a tool like Zapier?

- Is this something you can **delegate** to a virtual assistant or another member of your team?

- Is this something you can **eliminate** and just not do? *(Will anyone be hurt if this doesn't get done? If not, let's not do it).*

On the path to learning how to automate, delegate, or eliminate tasks and projects that cross my desk, I learned about a virtual assistant service, Fancy Hands, that you can use to automate repeating tasks:

- **Monthly**: Call my barbershop or stylist and book an appointment for any open Friday on my calendar

- **One-Off**: Call Home Depot and check on the price for plywood — and see what the delivery fees are

FancyHands has let me be a more efficient person and save my time and energy. And then spend that time and energy on myself, relaxing.

Why Delegate?

As your business grows, the projects that you used to spend your time focused on just aren't the projects you need to focus on *now*.

When you level up as a business owner, you're left with *more* projects competing for your scarce attention.

You're left with three choices:

- Automate your project, by having a robot like Zapier or marketing automation like Drip handle it for you

- Eliminate your project, by deciding that you Just Don't Need To Do It anymore

Or delegation: passing the project to someone else to execute on yours behalf.

Time and time again, I have found delegation to be a 'secret weapon' for my business. If I can delegate a project to someone else, I can get the *results* of the project without *investing* my time, my most scarce resource.

Not every project that you delegate goes correctly. Some go okay and some go poorly. But that's fine. One bad apple doesn't spoil the bunch and you want to be focused on training that delegation muscle.

How do you build that delegation muscle?

- Practice investing the time in creating Standard Operating Procedures *(SOPs or checklists)* for your business tasks

- Hand off the SOPs to someone else on your team, a junior member or a virtual assistant, to execute on your behalf

It might take you *as long* to create the SOP and train someone on doing it as it would to complete the task yourself. And you might be taking that as a reason not delegate.

But don't think of it as taking the same amount of time. That's false. Instead, it may take you as much time to set up the effective processes for delegation as it would you to do the task *this one time*, but once you've set up those processes for delegation, you've dramatically reduced the amount of time that it takes you complete the task in the future.

A fellow freelancer puts it this way:

> I hired my assistant to replace me and I told my assistant her #1 priority is to replace herself with a robot *(Zapier)*.

Day to day, as you identify projects that you could shift off your plate, do that. Let your assistant — team member, virtual assistant, etc — handle the project for you.

Learning to delegate carries a cost to you in learning how to practice this new skill, but as you become more effective at delegation, you will recoup that time invested.

What types of projects should you delegate?

Initially, you should delegate small, discrete tasks with a fixed scope:

- Call Home Depot and check on the price for Plywood

- Email my colleague and ask them if these dates work for a meeting

- Call the plumber and reschedule for any of these times this week or next week

Small, simple things. This is as much an exercise in you building trust that the delegation system will work as it is building the delegation system.

Then, over time, you can expand to larger projects:

- Continually log the podcasts that PERSON appears on

- Weekly, get the data out of my email program and tell me how many subscribers I'm up/down

- When I send out a newsletter, repost it to my site as an article

As you knock out the smaller items from your todo list, you make space to recognize the larger items on your todo list and then delegate them as well.

Introduction — 80/20 Delegation

Let's talk 80/20 rule.

How can you get the most impact for the smallest investment?

When it comes to delegation, there are a number of different cost centers, some hidden, some not:

- The direct cost of retaining the employee or assistant

- The time spent training the employee or assistant

- The cost of tasks done incorrectly or not-perfectly the first time

With these tasks in mind, there are two optimizations that I suggest, if you're just getting started with delegation:

- Use a 3rd party service to vet your virtual assistant for you. That makes it easier for you to pick someone that is already qualified.

- Start by delegating small, discrete tasks that are easily scoped and take a small amount of time to complete, say, ~20 minutes. That makes it easy to identify small, discrete tasks to delegate that aren't mission critical and that you can use to refine your delegation system and train the person you're delegating to.

What You'll Learn In This Guide

In this guide, you'll learn:

- Recommendations for services to help you find a Virtual Assistant to help you delegate small, medium, and large tasks

- How you can use delegation to better manage your projects

- The specific language you can use to delegate tasks, projects and assignments to another person

- Specific examples of tasks and projects *(and word-for-word email scripts)* you can use to start delegating projects today

I'm biased. I've used FancyHands, a virtual assistant service, for years. I strongly recommend checking them out. And if you use my referral code (http://kaidavis.com/loves/fancyhands), **you'll save 50% off the cost of your first month of Fancy Hands (or 5% off your first year of Fancy Hands)**!

That's savings of up to $32.50 in your first month if you sign up for Fancy Hands' 'Premier' plan.

Also, if you sign up using this link, Fancy Hands will give me $20 towards my monthly bill, as a 'thank you' for referring a new customer to Fancy Hands.

==> Save 50% Off Your First Month of Fancy Hands

Even if you have no experience delegating or working with Virtual Assistants, this guide will show you the *specific tactics* you can use to get the best results out delegation, be it to a co-worker, an employee, an intern, or a Virtual Assistant:

- The specific scripts you can use to delegate projects and manage the results

- Detailed, step-by-step project examples showing exactly how you can break a project down into small, bite-sized tasks and then delegate them

- Email templates that you can copy and paste to get started or get your project on track

- A step-by-step process for taking a project off of your to-do list and turning it into a series of tasks that you can delegate to Fancy Hands

When you're reading this guide, I want you to get the most out of this information. I want you to treat it with the respect you'd treat an intensive 1-on-1 coaching session that you spent $1,000 on.

As you begin to read this guide, you can help yourself get massive results out of this information, out of Fancy Hands, and out of building a system build on delegation, by just following these four simple rules:

- **Identify What You Want Out of This Guide** — Take a moment and think about what you want out of this experience. Do you want to better understand how to delegate projects?

Are you looking for information on how to use Fancy Hands? Something else? Whatever your goal, take a moment and write down exactly what you're looking for.

- **Take Notes While You Read** — Read this guide with a notepad and a pen at hand. When you come across something that makes you sit up and think, stop reading and take note.

- **Practice While You Read** — If you come across something that makes you stop and think "huh, I can see how I can use this," put this guide down! Take a moment to practice the lesson you just read.

- **Sign Up for a Fancy Hands Account**— The best way to practice the skills in this guide is with a Fancy Hands account. As you read through this guide, you may suddenly see an easy way to turn a project you've been avoiding into a task you can delegate to Fancy Hands. When you do, open an account and start delegating.

To help you get the most out of this guide, Fancy Hands has put together a special discount for you.

Fancy Hands 50% Discount

If you sign up for Fancy Hands through the referral link below, you'll save 50% off the cost of your first month of Fancy Hands (or 5% off your first year of Fancy Hands)! That's savings of up to $32.50 in your first month if you sign up for Fancy Hands' 'Premier' plan.

Also, if you sign up using this link, Fancy Hands will give me $20 towards my monthly bill, as a 'thank you' for referring a new customer to Fancy Hands.

==> Save 50% Off Your First Month of Fancy Hands

With these notes in mind, let's get started with Fancy Hands.

Chapter 1 — Delegation 101 (with Fancy Hands)

Fancy Hands is a Virtual Assistant service. Like a personal assistant, Virtual Assistants help you by managing your tasks, scheduling your appointments, making your calls and handling your research.

The difference? With a Virtual Assistant, your assistant could be anywhere in the world.

Fancy Hands is a team of U.S. based Virtual Assistants. Based in New York City, Fancy Hands hires assistants from around the U.S. (mostly major metropolitan areas like Boston, Portland, Seattle, or San Francisco) to help you.

Working with a U.S.-based assistant is a huge benefit. They under-

stand your language, your conventions and your slang better than any international assistant could ever hope to.

With Fancy Hands, you never need to struggle to communicate yourself. You're working with someone who has a native understanding of English. Think of Fancy Hands like a friend, neighbor or co-worker helping you out on a project.

About Fancy Hands

Founded in New York, Fancy Hands is dedicated to providing Virtual Assistant services to people around the world.

When you sign up for Fancy Hands, you can start submitting tasks right away - no waiting and wondering, just working.

You can submit a single task, or a bunch of tasks, and then get back to working on more important things.

When you submit a task, it's assigned to one of Fancy Hands' U.S.-based Virtual Assistants who'll begin working on the project right away. You don't have to worry about language or cultural barriers

as you get started. Working with Fancy Hands is as easy as sending an email to a friend or co-worker.

Fancy Hands has been busy providing Virtual Assistant services to people for a long time, and has developed quality control measures to make sure that each request you send in is handled quickly and successfully. On top of that, you're in control if your Virtual Assistant misses something.

One major benefit of working with a Virtual Assistant is that your Virtual Assistant is everywhere you are. You can request your tasks by email, phone, or the web, from anywhere on the planet.

Need to buy flowers? Lunch? A fancy jet ski? Fancy Hands can do it for you.

How Can Fancy Hands Help?

Do you have a growing to-do list?

Do you ever find yourself wishing you had another set of eyes or hands to help you manage your day?

Do ever wish you had someone trained that you could trust to accomplish tasks for you, without having to worry if things will get done?

If any of those feel familiar to you, Fancy Hands can help you make more time to focus on the things you love and want to be doing.

Fancy Hands is a great way to have support for your projects, but it isn't a replacement for doing your actual job.

Think of Fancy Hands as a friend or co-worker that can help you out by handling the small tasks that pop up during the day (like rescheduling an appointment or ordering lunch to your office) so you can focus on the tasks and projects you want to focus on.

What Fancy Hands Is

A Virtual Assistant that's just an email away

Your Fancy Hands assistant is everywhere that you are. You can request tasks by email, phone or on their website, from anywhere on the planet. When something comes up, no matter where you are, you can reach out to Fancy Hands for help and support.

A quick and painless way to take care of tasks

Fancy Hands is great for tackling those 5-20 minute tasks like making restaurant reservations, doing light research, or scheduling appointments, that can distract you during your day.

Support that helps you focus on your job

Fancy Hands can do anything that doesn't require them to physically go somewhere for you. Any task, chore or project that a smart, patient, Internet-savvy person with a cell phone could accomplish, Fancy Hands can do it for you (as long as it's legal).

What Fancy Hands Is *Not*

A dedicated, full-time, 24/7 personal assistant Fancy Hands draws from a pool of U.S. based Virtual Assistants. You may work with the same assistant multiple times, but you won't have an assigned, dedicated Virtual Assistant. *(For a higher level and higher quality VA experience, I recommend the* **Virtual Assistant Finder from HorkeyHandbook***: https://kaidavis.com/loves/vafinder)*

An employee to handle long-term projects

Fancy Hands isn't a full-time employee or able to handle large, long-term, on-going projects. Those types of engagements require more of a Virtual Employee. To hire a Virtual Employee, visit Upwork.com or Freelancer.com.

A replacement for doing your job

Fancy Hands supports you by taking care of the small tasks that pop up throughout the day, so you can focus on the things you want to be doing.

If you're writing a report or article, Fancy Hands can help you find information and track down data, images, or perform other supporting tasks. However, Fancy Hands can't write your report or article for you.

Save 50% On Your First Month of Fancy Hands

Fancy Hands knows that you'll love having a Virtual Assistant, so it cooked up a special promotion for you.

> If you sign up for Fancy Hands by visiting the link below, you'll receive a 50% discount off your first month of Fancy Hands, or save 5% off your annual Fancy Hands account costs (http://kaidavis.com/loves/fancyhands/)

If you're looking to try out a Virtual Assistant service and see if it can help you, you should try the Fancy Hands Basic Plan.

You can upgrade at anytime to one of the larger plans. With your exclusive discount, the first month of the basic plan is only $12.50. This is the cheapest way to try a professional U.S.-based Virtual Assistant and see if they can help you.

Chapter 2 — Getting Started With Delegation

Once you sign up for a Fancy Hands account, you can send your first task to your Virtual Assistant by emailing request@fancyhands.com

Let's walk through how Fancy Hands works, what a typical Fancy Hands request looks like, and review some example projects to learn what best practices you should keep in mind when submitting tasks and projects to Fancy Hands.

Submitting Your Tasks

You submit tasks to Fancy Hands through the Fancy Hands website, by calling Fancy Hands at their private number, or by emailing request@fancyhands.com.

When you submit a task to Fancy Hands, you'll receive a confirmation email in roughly 5 minutes.

If your request is a smaller task *(like 'Find a price for Red Puma Sneakers on Amazon' or 'Call Target and ask if they carry Red Puma Sneakers')*, your Virtual Assistant will get started with the task and email you again when the task is complete.

Depending on the time of day when you submit your task, it can take anywhere from 10 to 30 minutes for Fancy Hands to complete the task and email you back.

If you request a larger task *(like 'Reserve a hotel room in Portland on October 3rd' or 'Find tickets to the Bluegrass Festival that are under $100')*, Fancy Hands may email you back with follow-up questions. Once you've answered them, they'll get to work on your task for you.

Depending on the size and scope of your task, it may take up to a few hours for the task to be completed.

If Fancy Hands runs into any delays (long wait times, people out of the office, end of business hours, etc.), they'll send you an email

letting you know when they'll be able to get back to work on the task.

Writing Your Request

There are 3 essential components to a Fancy Hands request email:

- Your email subject line

- Your task

- Your requested deliverable

On the next section, we'll take a look at what a typical Fancy Hands request looks like to see the best practices we can learn.

Writing An Effective Subject Line

The subject line of your email should be specific about the task of the email, and describe it in a way such that someone could understand the task and the goal just by reading the subject line.

A best practice you should follow is starting your subject line with the Action Verb that describes the specific physical action the task requires. Action verbs are physical verbs like 'Call', 'Find', 'Research' or 'Email'.

Visualizing Requests

When you're writing your task request email to FancyHands, a best practice to follow is to draft them email in bullet point form, breaking down the steps one-by-one.

Visualize the steps you'd need to take if you were going to complete the task yourself, and include all of that information.

The End-of-Task Deliverable

When Fancy Hands completes your request for you, what will have changed in the world?

Will an appointment be scheduled? Information gathered? A purchase made?

If you're asking Fancy Hands to research information for you, a good practice to follow is asking them to create a document (like a word document or a spreadsheet) to collect the information, and then send you the document at the end of the project.

If Fancy Hands is scheduling an appointment for you, you should ask Fancy Hands to add the event to your calendar and email you confirming the appointment.

If they're making a purchase for you, ask them to email you the receipt.

Whatever your request, clearly describe the deliverable you expect at the end of the project to set clear expectations.

What if... I goof up?

If you goof up and send in an incorrect or incomplete task, that is very easy to fix.

Simply respond to the Fancy Hands confirmation email and let them know that the task isn't ready yet or mention you left out some crucial information.Explain what you meant, include any

additional information or notes, or clarify the deliverable you're expecting at the end of the project.

All of the Fancy Hands Virtual Assistants are experienced professionals. If you make a mistake, they're happy to work with you to ensure your task is completed successfully.

What if... Fancy Hands Goofs Up?

Here's why you'll love Fancy Hands: working with them is like working with a close friend or co-worker on a project, instead of a nameless, faceless company.

The few times that Fancy Hands has goofed up on a project or task I've submitted to them, they've immediately worked with me to correct the mistake and make sure the task is completed correctly.

Example Task: Schedule Your Appointment

Fancy Hands is great for calling offices to make or reschedule appointments.

When using Fancy Hands to handle your schedule, make sure to send any information that your Virtual Assistant might need to be successful with this task.

Do you have an account number? Did you include your available times? Are you a new client?

Think through the steps you'd take to complete the task and any information you'd need. Then, include that information in your email to your Virtual Assistant.

Best Practices: Keep These In Mind!

You'll need to include all relevant information with each task.

Your Virtual Assistant can't see your previous tasks. If you've mentioned your phone number or address in another task email, your current Virtual Assistant can't see that information.

If you're scheduling an appointment, what information will the office need from your assistant — phone number, address, email address, something else? Include that information with the request.

What should your Virtual Assistant do if no times are available? Specify what they should do in case they can't complete the task as requested.

Example Task: Find a House Keeper

Fancy Hands is a wonderful way to find highly-reviewed and competent people to help you with projects or tasks.

Fancy Hands is great at researching providers, getting quotes and setting up times to interview people (or scheduling ongoing services).

You can use Fancy Hands to research, call, interview and schedule housekeepers, repairmen, movers and more.

The key thing to remember: Fancy Hands is a great way to find leads and compare their costs and benefits, but before you hire someone you'll want to meet with the provider yourself.

Best Practices: Keep These In Mind!

If you're asking Fancy Hands to search something for you, you'll want to specify where you want them to search.

If you have a particular way you want the task accomplished, specify that when you write out your task. When hiring a housekeeper, you can ask Fancy Hands to look at the Google search results for "MY TOWN Housekeeper", search on Yelp, Craigslist, or call leads from the phone book.

If you're hiring someone to perform a service (housekeeping, car detailing, yard work), keep in mind the factors that you care about the most (hours of operation, location, reviews, prices, services, or benefits) and ask your Virtual Assistant to identify those factors in their research.

Example Task: Research Prices for a Trip

Fancy Hands is a wonderful way to research the cost of tickets for a trip.

You can ask Fancy Hands to research the prices for a quick

overnight trip out of town, compare flights or hotels for a longer trip, or put together an itinerary for an extended trip to a foreign country.

When you send in your task, specify the criteria you care about (cost, destination, travel dates). With those factors in mind, Fancy Hands can find the exact information you need.

Best Practices: Keep These In Mind!

If you have a destination in mind (or a ticket already purchased), it's easy to fire off an email to Fancy Hands and ask them to search for hostels, hotels or AirBnBs near your destination.

If you're attending a conference or convention — or taking an overnight trip out of town with a sweetheart — you can use Fancy Hands to research the cost of flights, find lodging near your destination, and put together a short list of restaurants to visit.

If you're traveling with friends, it's easy to have Fancy Hands compare routes, ticket prices, and confirm everyone's availability

for a trip, just by sending in a quick email and asking for your Virtual Assistant's help.

Example Task: Researching Tourist Destinations

If you're on vacation to a foreign country, you can use Fancy Hands to delegate your sightseeing planning.

Send Fancy Hands a short email with the name of the city you're visiting and the type of attractions that you're interested in, and ask them to put together a short list of 3-5 places to see, a few restaurants to eat at, and any interesting events that are taking place during your stay.

Best Practices: Things To Keep In Mind!

If you're traveling, keep in mind the time zone you're in and the time zone your Virtual Assistant lives in. If you're visiting a European city, you can be 9-12 hours ahead of your Virtual Assistant for example.

If you're visiting an area where you don't have frequent Internet access or you're a few hours ahead of your Virtual Assistant, make a habit of sending off batches of tasks to your Fancy Hands before you go to sleep. If you time it right, you'll wake up to an inbox full of research that your Virtual Assistant took care of while you were still asleep!

Example Task: Research Restaurants in a Strange City

If you have dietary restrictions, it can be challenging to visit a new city and quickly find restaurants you can eat at or grocery stores that you can shop at.

By delegating this research to Fancy Hands, you can easily find a list of restaurants or grocery stores that meet your restrictions before you even set foot in a strange city.

Best Practices: Things To Keep In Mind!

When asking Fancy Hands to research a list of restaurants for you, it's really helpful to indicate the area you'd like them to search in,

your target average rating on Yelp, cost of a meal, and your dietary restrictions.

When I ask Fancy Hands to do this research for me, I ask them to send me a link to the restaurant's menu in their response. It's really helpful when making a decision to be able to click a link in an email and look at the restaurant's menu.

If you're visiting a new city, email Fancy Hands 1-3 days before you arrive and ask them to send you a list of restaurants or stores that meet your restrictions. When you arrive, you'll know exactly where to go.

Chapter 3 — Project Management by Delegation

By now, you're familiar with the basics of how Fancy Hands works, how to submit tasks, and the best practices that help you get the most results out of your tasks.

In this section, we'll take our research one level deeper and look into the specifics of how to identify large projects from your to-do list that you are ready to delegate to your Virtual Assistant.

You'll learn how to break your projects into small groups of tasks, and how to delegate specific individual tasks that are part of a larger project to your Virtual Assistant.

What Projects Are Stuck On Your ToDo List?

If you have a to-do list within your reach, it might be a carefully pruned list of the exact projects you're committed to working on over the next 2 weeks.

Or it might be a rambling, sprawling list full of hopes, fear, obligations and commitments that represents everything you're thinking about or afraid of happening over the next year.

In either scenario — or a to-do list that's a moderate, middle-ground — Fancy Hands can help you have more control over the tasks and projects that are at the top of your mind.

Three Questions To Delegate Projects

These are 3 questions that you can answer and use to turn large projects into tasks for your Virtual Assistant to handle.

1. What Does Success Look Like?** When you have a project sitting on your to-do list, it can be hard to understand *where* to start.

By defining what project success looks like, you can backtrack to where you're starting out, giving you a clear path from where you are to where you want to be.

2. Can You Delegate The Tasks Related To This Project?

Is this something you absolutely, positively have to do yourself? Is it because of knowledge that only you know? Can you capture that knowledge in a document and delegate both the document and the project to someone else?

By understanding the barriers that are preventing you from delegating this project, you can understand what information you need to capture to succeed in delegating these tasks.

3. How Will You Know When The Project Is Complete?

When the project is complete, what information will you have that you don't have right now? Be specific. Is it a document? An appointment? Something tangible?

By understanding the specific change you'll see in the world when the project is complete, you can clearly instruct your Virtual Assistant in what you're expecting to see when they complete the project.

Is Your ToDo List Covered In 'Rot'?

The problem with large projects that get stuck on your to-do list is that often there's no clear indication of what you should do next to move the project forward.

Without a clear, physical next action, all you can do is sit and stare at your to-do list, wondering what's supposed to happen next.

There's a term for these types of projects: **List Rot!**

The projects sit and sit on your to-do list for months until your

to-do list is so bogged down with projects which haven't moved forward that you're afraid to open it up!

The solution that most people take? Start a new list! Move all the old hopes and fears across from the old list and restart the whole process.

On top of that, the projects that most often get stuck and turn into list rot are large, ambiguous projects that are too big by themselves to delegate to a virtual assistant (projects like 'write a book', 'take a vacation' or 'find a new job').

If you were to delegate those types of projects, what exactly should your Virtual Assistant do? Go on your vacation for you?

To successfully delegate these projects, you'll need a clear understanding of what you're trying to change by completing these projects and a clear list of the specific physical actions necessary to complete this project. For example, "Take a vacation" → "Book a 3-day weekend trip by train to a nearby city and schedule a hotel".

To get started, you're going to practice taking these large, rotting

projects off your to-do list and work your way through them, answering a series of questions to identify:

- **Is this even a project you want to work on?** Sometimes projects can get captured on a list and remain there way past their expiration date. Don't want to do it anymore? Toss it.

- **What — specifically — will it look like if and when this project is complete?** Once you have that vision in your mind, if it isn't something you want, toss the project and figure out what you do want.

- **What questions do you have about this project?** Questions are good! Questions often translate into direct, physical actions you can take. As you come up with questions, capture them in a notebook or text file so you can figure out what steps to take to move this project forward!

Triaging Projects — Questions to Ask

Question: Is this project something you absolutely and honestly want to spend your time working on?

You've got 5-6 free hours in a day to work on a project. If you spend that time working on a project you don't want to be doing, you won't get anywhere — and you'll hate yourself for wasting your time.

When you review the projects on your to-do list, ask yourself: 'is this something I really want to be working on?'

> Question: When I think about working on this project, what's the most exciting part?

If you've had a project sitting on your to-do list for a few months, ask yourself what part of the project you're most excited about.

The parts you're actually interested in (skills you want to practice, connections you want to make, experiments you want to test) may be things that you could bring to dozens of different projects, not just the one stuck on your to-do list.

> Question: Would I feel better if I didn't have to think about this anymore?

Feel free to kill projects on your to-do list. It's perfectly natural and normal to find yourself saying 'this is something that was interesting, but now I don't want to do it.'

> Question: How will I know when this project is complete?

For projects that are left on your to-do list (things that you're both interested in and excited to work on), how will you know when the project is completed successfully?

> Question: What's a specific date that this project needs to be completed by?

If you don't have a completion date in mind for a project, you're almost guaranteeing that it'll never get finished.

Other projects with completion dates will pop up, you'll focus on those, and the project at hand will be ignored. A completion date is a promise that you're making to yourself. By assigning a time-frame to the project, it's easy to see if it's something you can realistically accomplish in the time you have available or if it's something that you're better off renegotiating.

> Question: What questions do I have about this project?

For the projects that are left on your to-do list, what questions do you have? When you think about the project, what questions come to mind? Capturing the questions — and seeing where the holes are in your knowledge — is more important than immediately knowing the answers. We want to take this time to study the projects on your to-do list and identify the questions that you don't have answers to.

Example: Breaking A Project Into Specific Tasks

Taking a look at the projects left on your to-do list. A few may be things you wanted to do at some point, but the joy you originally felt at completing the project has left you.

Delete those projects.

Cross them off. Forget about them. Mark them as done.

For the projects that are left (things you actually want to work on), you'll want to walk through them using the following Project Breakdown Questions and see how and if your understanding of the project changes.

Let's do this exercise a project that's near and dear to my heart: taking skydiving lessons.

The goal is to use these questions to understand the specific goal of the project, the physical actions required to complete it, and any deadlines that are present.

Project: Start Skydiving Lessons

For this exercise, we're going to walk through the answers to the 6 questions outlined in the previous section.

This will give you an idea of how to approach them, the type of answers you're looking for, and how to pull specific tasks out of the project.

> Question: Is this project something I absolutely and honestly want to spend my time working on?

Yes! I've gone skydiving once before, and I loved it. If I complete certification as a skydiver, I'll be able to go skydiving anywhere in the world.

> Question: When I think about working on this project, what's the most exciting part?

The most exciting part is knowing that once I've completed my certification requirements, I can go skydiving anywhere in the world. Hawaii? Oregon? China? If I'm there, I can go skydiving.

> Question: Would I feel better if I didn't have to think about this anymore?

Nope! I'm very excited to work on this project.

> Question: How will I know when this project is complete?

When this project is complete, I'll have earned a skydiving certification, and be able to go on unassisted skydiving jumps.

> Question: What's a specific date that this project needs to be completed by?

I'm not sure how long certification will take, but to put a date to this project, I want to have completed all my requirements by July 30th, 2014.

> Question: What specific questions do I have about this project?

The key part is identifying these questions, not the answers. This is all about getting the open questions that are stuck in your mind down on paper so you can find the answers later.

Here are the questions that came to mind:

- What are the requirements for a skydiving certification?
- How many lessons does certification take in total?
- How long does the certification process take?
- How much does certification cost?
- What equipment do I need?

- Do I need to purchase this equipment to get started?

- How much do individual lessons cost?

- Are there discounts available for purchasing a block of lessons?

- How much does an individual jump cost once I'm certified?

- What skydiving schools are located near me?

Looking at these questions, you can start to see how they relate to each other: some focus on lessons, some focus on equipment, and others focus on the certification requirements.

By grouping each question with similar questions, we can start to see the questions and tasks that make up this project:

- Research skydiving certification requirements

- Make a list of skydiving schools within 30 miles of my home

- Research how many classes each school says it will take to earn my certification

- Get price quotes from each school on the certification package

- Research what equipment I'll need to purchase for lessons and for individual jumps

- Schedule my first lesson

- Add skydiving lessons to my calendar

- Attend skydiving lessons

What did we gain by going through these specific questions? We were able to identify if this project is something we honestly want to focus on, identify the open questions we have about the project, and break out specific tasks that we need to accomplish towards completing it.

How To Delegate This Project To A Virtual Assistant

The key to focusing on what you really want to be doing? Ruthlessly delegating what you *don't* want to be doing.

Any task that doesn't require your absolute and specific attention should be delegated.

Take a project like 'Order a gift for my friend's birthday'. You probably have an idea in mind for the type of gift your friend would appreciate. But finding the gift, comparing prices and ordering it are all steps that don't need your specific attention.

If you delegate this example to a Virtual Assistant, you can focus your attention on other tasks instead of having to go through the motions yourself.

How To Delegate Sky Diving

Let's take another look at our skydiving project. Our goal is to identify the specific tasks that we can delegate to a Virtual Assistant.

- Research skydiving certification requirements: ☐ Yes! We can delegate it!

- Make a list of skydiving schools within 30-miles of my home: ☐ Yes! We can delegate it!

- Research how many classes each school says it will take to earn my certification: ☐ Yes! We can delegate it!

- Get price quotes from each school on the certification package: ☐ Yes! We can delegate it!

- Research what equipment I'll need to purchase for lessons and individual jumps: ☐ Yes! We can delegate it!

- Schedule my first lesson: ☐ Yes! We can delegate it!

- Add skydiving lessons to my calendar: ☐ Yes! We can delegate it!

- Attend skydiving lessons: X We can't delegate this

Out of the 8 tasks we identified as essential to this project, 7 of them can be delegated to a Virtual Assistant.

The one task that's left is the thing we actually wanted to focus on: taking skydiving lessons!

How To Delegate Tasks To A Virtual Assistant

Once you've identified the tasks for a project, you'll need to:

- **Organize Tasks** — Organize the tasks in the logical, sequential order they need to occur

- **Unpack Dependencies** — Identify anything that needs to happen before a task can be started

- **Delegate Tasks** — Email your tasks to your Virtual Assistant

Organize Tasks

Thinking about the order you'll need to complete each individual task in, does an order pop out at you?

Each step should have a specific place in your project because of how it relates to the other steps in the project.

Some tasks can occur simultaneously, others need to take place in a specific order.

What general order do you see? What needs to happen towards the start of the project? Which tasks can you delegate first?

Unpack Dependencies

As you review the tasks in front of you, is there any information or additional steps that will need to be in place before you can get started?

If there are, add those tasks into your list as part of your overall project.

Delegate Tasks

When you've identified all the tasks that are part of the project and unpacked any hidden dependencies, you're ready to start delegating these tasks to your Virtual Assistant.

To get started, just send an email to request@fancyhands.com. Include a clear subject line and a thorough description of the task you're assigning them.

Chapter 4 — Advanced Delegation Tactics

This section covers advanced, high-level strategies and tactics for getting the most out of your delegation.

If you're already comfortable delegating, have a grip on your to-do list, and feel ready to tweak your process, this section will help you apply the polish to your Virtual Assistant management and delegation.* ## Explaining Tasks When Delegating

When you delegate a task to a friend, family member or Virtual Assistant, the rule of thumb you should always follow is explaining the task as if you were writing instructions for an intelligent, capable person who knows English as a second language.

- Explain all acronyms

- Avoid any abbreviations

- Include any and all relevant background information

- Use bullet points to explain the order of the task

- Explain what you expect to receive when the task is completed

Start Your Tasks With Action Verbs

When you write down a task, start the description off with an action verb.

Merlin Mann of 43Folders clued me into this habit. Here's are two excerpts from two of his articles:

- Building a Smarter To-Do List and

- Project Verbs vs. Next Action Verbs

> Articulating your to-dos in terms of physical activity — even when they require only modest amounts of actual exertion — has a variety of

benefits. > *Most importantly, this ensures that you've thought through your task to a point where you can envision how it needs to be undertaken and what it will actually feel like once you're doing it. This means you can easily visualize the activity, the kinds of tools you'll need, and perhaps even the setting where the work should take place. It's not just a bunch of tasks you've written on a page."* — *Building a Smarter To-Do List*

In fact, one of the hang-ups that many people encounter in planning their work in GTD [Getting Things Done] is that, no matter how hard they try, they can never seem to get the distinction between single-action verbs and the larger "look into" style projects that may require sub-actions. This comes up a lot, and it can lead to frustration and untold friction.   — Project Verbs vs Next

> Action Verbs* Project verbs are the larger "look into"-style projects with multiple sub-actions.

Project Verbs

- Finalize

- Resolve

- Handle

- Look Into

- Submit

- Maximize

- Organize

- Design

- Complete

- Ensure

- Roll Out

- Update

- Install

- Implement

- Set-Up

Next Action Verys

'Next Action' verbs are single-action verbs that describe a physical action.

- Call

- Organize

- Review

- Fill Out

- Find

- Purge

- Look Into

- Gather

- Print

- Take

- Waiting For

- Load

- Draft

- Email

- Buy

Both of these lists are from Merlin's article Project Verbs vs. Next Action Verbs.

Specify Your Desired Outcome

When your Virtual Assistant completes this task, what will have changed in the world?

For every task you send to your assistant, before you click 'Send' you need to have a clear understanding of what will have changed in the world once the task is complete.

Then, write that down in the email as part of your instructions, so your Virtual Assistant knows what impact or result you're looking for.

Maximize Research Projects

If you're asking Fancy Hands to manage a research project for you, ask them to create a Google Document to collect all the information they find. Once their research is completed, have them share the Google Document with you.

If you need to share the results of the research project with a co-worker, it's easy to share this Google Document.

Finding The Perfect Restaurant

When you're researching a restaurant, indicate the area you want Fancy Hands to search in, the average rating you're looking for, and the cost you want to pay.

If your party has any dietary restrictions, ask Fancy Hands to call in and see if the restaurant can accommodate these restrictions.

If you're in a rush, instruct Fancy Hands to call in and ask if the restaurant has any reservations available for a group from out of town.

Understanding Task Time Limits

Fancy Hands will spend 10-20 minutes on any task that you submit. If your task will take longer than that, they'll ask you to resubmit the task as multiple smaller tasks.

Before you send your task into Fancy Hands, think about how long it would take you or a friend to complete the task. If it would take too long, break it down into smaller tasks.

[Fancy Hands logo]

Save 50% On Your First Month of Fancy Hands

Fancy Hands knows that you'll love having a Virtual Assistant, so it cooked up a special promotion for you.

> If you sign up for Fancy Hands by visiting the link below, you'll receive a 50% discount off your first month of Fancy Hands, or save 5% off your annual Fancy Hands account costs (http://kaidavis.com/loves/fancyhands/)

If you're looking to try out a Virtual Assistant service and see if it can help you, you should try the Fancy Hands Basic Plan.

You can upgrade at anytime to one of the larger plans. With your exclusive discount, the first month of the basic plan is only $12.50. This is the cheapest way to try a professional U.S.-based Virtual Assistant and see if they can help you.

Alternatively, I highly recommend the Virtual Assistant Finder

from HorkeyHandbook as another way to find the right Virtual Assistant for you.

Conclusion — Get Delegating

This guide is to help awesome people (like you!) get more things done and focus on the things they want to do.

- Sign up for FancyHands here and save 50% off your first month of FancyHands

- Sign up for the Virtual Assistant Finder from HorkeyHandbook and find the perfect Virtual Assistant for you

Who wrote this?

My name is Kai Davis. I'm a marketing consultant and entrepreneur living in Oregon. You can read more about me on my website.

— Kai