OWNER-LIGHT SYSTEM · TOOLKIT

# The Delegation Toolkit

The decision-routing table, the interruption log, and the handoff briefs that make work stay handed off instead of bouncing back to you.

**$17,000**

WHAT RE-DOING IT COSTS

The Main Street Operator

$67

### HOW TO USE THIS

This is a toolkit you fill in, not a book you read: six files, each with a worked example beside a blank, that take the work off your desk one handoff at a time.

- **Start tonight.** Hand off one bouncing task using the included `handoff-brief.md`, before you touch anything else.
- **Fill in the rest.** Fill the decision-routing table, the rule cards, the standup agenda, and the interruption-log spreadsheet from your own week.
- **The scored version is free.** This teaches the drivers and hands you the templates; it does not score you or compute your number. The free Keystone diagnostic does that in four minutes at app.trykeystone.io.

### THE SHORT VERSION

A bounced handoff pulls you back into 12 to 15 hours a week you should not be working. Four missing pieces cause every bounce, and the templates that fix all four are ones you fill in tonight.

$17,000 a year. That is what re-doing the work you already handed off costs you, in hours a $22 coordinator could cover, and it is why you quietly stopped delegating at all.

You handed the estimate follow-up to your office lead three weeks ago. Within nine days it was back on your desk, done half-right, and you fixed it yourself at 9 that night rather than explain it a third time.

So you stopped handing things off, and the business is running through you again. That is the trap this toolkit takes apart.

Most owners read the bounce as proof the team cannot handle the work. It is almost never that.

The work bounced because it was handed off without the four things that make a handoff hold. This kit hands you those four as templates you fill in tonight, plus the spreadsheet that shows you, in numbers, how much of your week can leave your desk.

Here is the arithmetic behind that number. Those 12 to 15 hours a week, at the $22 an hour a coordinator costs, run to about $17,000 a year, and less than the same hours cost at your own rate.

The business does not have a delegation problem in the abstract. It has a specific, priced problem, and this kit takes it apart one handoff at a time.

# Start here: one handoff tonight

You do not need the log, the sort, or two weeks to get the first win. Pick the one task that bounced back most this month, the one you keep taking back and finishing yourself after hours, and hand it off cleanly tonight.

Open `handoff-brief.md`, fill its five fields for that one task (outcome, standard, guardrails, check-back, and what "done" looks like), and hand it off out loud with the words in `delegation-script.md`. Zero logging, one complete handoff that holds, done before bed.

Beyond the paper interruption log you may know from the Owner-Light Starter (A1), this kit is the working version: an interruption spreadsheet that counts the four categories as you sort them, a routing table filled in from your own week, and a 15-minute weekly standup that keeps handoffs from sliding back. That first handoff tonight is the proof the rest builds on.

# Why handoffs bounce

A handoff comes back for one of four reasons, and usually more than one at once. Name all four and the work stays where you put it.

- **No outcome named.** You said "handle the follow-ups," not "every quote over $2,000 gets a call within 48 hours until we have a yes or a no." The person guessed at the finish line and missed it.
- **No standard.** They did it their way because you never showed them what good looks like. A photo, a filled example, one done invoice: that is a standard.
- **No guardrails.** They hit a decision you never told them they were allowed to make, so they either froze or guessed, and it came back to you either way.
- **No check-back.** You handed it off and vanished. The first wobble had nowhere to go but your desk, at the worst possible hour.

> *A handoff without a check-back is not delegation. It is a delay.*

The `handoff-brief.md` template is those four fields on one page, plus a fifth line that says what "done" looks like so nobody has to ask. Fill it once and the task holds.

That is the core move. The rest of the kit makes it stick across the recurring work, not just the one task.

## What is in the kit

Six instruments, each real and filled, each with a blank beside the example so you see what "done" looks like before you start.

| | | |
|---|---|---|
| 6<br>instruments | 2<br>weeks to roll out | 15<br>min weekly to hold it |

- `interruption-log.xlsx` is the spreadsheet you fill in. You log every interruption for five working days, sort each into one of four categories with a dropdown, and the tally counts them by category so the size of the problem stops being a feeling and becomes a number.
- `decision-routing-table.md` turns the two routable categories (Rule and Confidence) into a one-page table your team reads instead of calling you.
- `handoff-brief.md` is the one-page brief that makes a single task stay handed off: outcome, standard, guardrails, check-back cadence, and what "done" looks like.
- `rule-card-template.md` turns a repeated judgment call into a one-line rule anyone on the team can run without you.
- `delegation-script.md` is the exact words to hand a task off, and the harder words to hand it back when it bounces.
- `weekly-standup-agenda.md` is the 15-minute cadence that keeps all of it from sliding back.

Here is how they connect. The log tells you what to route; the routing table and the rule cards route the recurring work.

The handoff brief and the scripts move the one-off work. The standup keeps the whole thing from drifting back onto your desk within a month.

## The two-week rollout

You have already handed one task off tonight and watched it hold. This rollout takes that from one task to the whole week, run once that first handoff has stuck.

You run two short passes. One to see the problem clearly, one to hand the work off in a way that holds.

One caution before you start: do not try to route all 15 at once. Pick the single interruption that costs you the most time or money, and hand that one off cleanly before you touch the next.

One handoff that holds beats ten that half-stick and teach the team your systems do not.

### Week 1: see it and sort it

Open `interruption-log.xlsx` and log every single time someone needs you, for five working days. One line each: the day, who came to you, what they needed.

Do not fix anything yet and do not improve anything. You are only capturing, because you cannot route a problem you have not measured.

At the end of the week, sort each row into one of four categories using the dropdown in the Category column:

- **Rule** means a standing rule could handle it ("under $250 in extra parts, the tech just approves it").
- **Confidence** means the team can do it but lacks the confidence or the authority.
- **Owner-only** means only you can decide it, because it turns on a customer relationship or your specific expertise.
- **Missing-SOP** means no written procedure exists yet, so the same question keeps coming.

The spreadsheet counts them for you. In the filled example, 15 interruptions landed in one week, and 10 of them (67%) were Rule or Confidence.

That is two-thirds of what hit the owner's desk that could have been handled without the owner. Seeing that number is usually the moment the resistance to delegating breaks.

Two sorts trip people up, so decide them once. **Confidence versus Owner-only** is the one that matters: if the team could make the call with authority you simply have not granted, it is Confidence, and it becomes a rule.

If the call turns on a specific customer relationship or on expertise only you carry, it is Owner-only, and it stays with you. When you are unsure, mark it Confidence: a wrong Confidence call is a coachable miss, and a hoarded Owner-only is another year at 9 that night.

**Rule versus Confidence** barely matters, because both become routing rows. Rule means a fixed threshold decides it; Confidence means a person decides inside a boundary.

Sort fast and keep moving. In the example week, the whole sort took about 20 minutes.

> **DO THIS TONIGHT**
>
> Open **interruption-log.xlsx** and, from memory, enter every interruption from today and yesterday: five minutes, no sorting yet. Tomorrow morning, keep the file open and add each one as it happens. You are starting the five-day capture now, not next Monday.

### Week 2: route it and hand it off

Now you turn the sorted log into a system, one category at a time.

Take the **Rule** and **Confidence** rows and build them into `decision-routing-table.md`. Each becomes a row with a specific condition, what the team does, and who decides.

Two hard guards keep the table honest. **Owner-only rows never go on the table**, because routing them away is the mistake that gets you a bad outcome and a lost customer; and **anything not on the table defaults to one line**, bring it to your manager by name, never back to you.

Take the two or three tasks that bounce most and write a `handoff-brief.md` for each. Take the judgment calls that repeat and turn them into cards with `rule-card-template.md`, so the sixth time the question comes up, the answer is already on a card.

Then hand the work off out loud, using the words in `delegation-script.md`.

Rule cards are where recurring judgment calls stop being interruptions. Pull the three or four questions your team asks you most, and write each as one line with a real number and a named boundary, using `rule-card-template.md`.

Six good cards cover most of what a crew argues about in a week. Pin them where the work happens: the truck, the office wall, the shared drive.

> **SAY THIS**
>
> "I am handing you the past-due follow-ups, start to finish. The outcome is every invoice over 15 days gets a call the same day, and you keep calling until it is paid or on a plan. Here is one I did last week so you can see the standard. You can offer up to a 5% courtesy on a documented issue on your own; over that, it comes to Renata, not me. Send me the aging list every Friday by noon. If it is on that list and moving, I will not check in. That is the whole deal."

> **DO THIS TONIGHT**
>
> Pick the one task that bounces back to you most often. Open **handoff-brief.md**, copy the blank template under the filled example, and fill all five fields for that task: outcome, standard, guardrails, check-back, and what "done" looks like. You will hand it off tomorrow.

## When it bounces anyway

It will still bounce the first time. The instinct in that moment is to sigh, re-do it yourself, and say nothing.

That single move is how you quietly re-absorb every job you just handed off.

Do the opposite. Hand it back, with the one specific gap named.

Nine times out of ten the gap is a single missing line in the brief, not a failing in the person. The hand-back script is in `delegation-script.md`, and it sounds like this:

> **SAY THIS**
>
> "This came back to me and I am handing it back to you, because it is a two-minute fix and it is yours now. The follow-up went out, that part was right. The gap: three of the six were over $2,000 and did not get the same-day call, they got an email. Same-day call on anything over $2,000. Re-run those three today and it is done. I am not going to take this one back."

Then fix the brief so the gap cannot happen twice, and watch for the second time. The first time an uncovered situation reaches you, it is a genuine escalation.

The second time the same situation reaches you, it is no longer a question.

> *The second time the same question reaches you, it is not a question. It is a missing rule.*

When that happens, it stops being something you answer. It becomes a new row on your routing table or a new rule card, proposed at that week's standup.

That is the loop that makes the system grow tighter over time instead of looser. The same question is never answered by you twice.

There is an opposite failure, and it is quieter. If every guardrail is set so tight that the team can decide nothing, you have not delegated, you have added a form.

The test is your own table: if fewer than half the Rule and Confidence rows let the team act without you, the thresholds are too low. Loosen them one notch and watch what actually goes wrong, which is usually less than you feared.

## Holding the line

A system without a cadence slides back within a month. The cadence here costs 15 minutes a week and lives in `weekly-standup-agenda.md`.

Your manager answers five questions once a week and sends them to you. The fifth is the one that matters most: what needed you this week that should not have.

Between standups the only trigger is exception. If the standup lands in your inbox, you do not check in during the week; if it does not, you check in.

That one rule is the entire daily discipline. It is what lets you actually step back instead of hovering.

Anything that surfaced twice this week gets written up as a rule that week, not "someday." Over 90 days, the count in your interruption log should fall from something like 15 a week toward a handful.

The ones that remain should be the genuine Owner-only calls that were always yours to make.

Put dates on it so it is real. By day 30, the Rule and Confidence interruptions should be dropping and the standup should land on time most weeks.

By day 60, the team should be deciding the routed items without you noticing. By day 90, you should be able to name the handful of Owner-only calls that are left, and take a full day off without one phone call.

**Plain terms:** this is general operating guidance for running a service business, not accounting, tax, legal, or investment advice, and it makes no promise about your results. The dollar thresholds in the examples are illustrations, not recommendations for your business. Your business is specific. For decisions with tax or legal weight, talk to a licensed accountant or attorney who knows your books.

YOUR NEXT STEP

This toolkit is the static version: you fill it in by hand and hold it by discipline. The living, scored version is the **free Keystone diagnostic**, which scores your owner-dependence as a number you watch fall each month instead of guessing. Run it first: 18 questions in about four minutes, returning three scores (business independence, systems maturity, acquisition attractiveness) and an estimated sale price. When you are ready to walk the full 90-day arc to the 14-day test where the business runs two weeks with no call to you, **The Owner-Light Course (A3)** is the next rung.