

EXECUTIVE PERFORMANCE SERIES

Executive Delegation Checklist

How high-performing executives reduce operational bottlenecks, improve decision flow, and reclaim strategic time through structured delegation systems.

4

PHASES

48h

VACATION TEST

4

AUTHORITY LEVELS

15m

DAILY SYNC TARGET

WHY THIS MATTERS

From Task Assigning to System Building

To reclaim strategic time, an executive must stop managing individual tasks and start building delegation systems. High-performing leaders treat their Executive Assistant as an **Operational Multiplier** — a force that extends reach, filters cognitive load, and keeps operations moving without requiring constant presence. This checklist implements a **Human-in-the-Loop system** that reduces decision fatigue and creates the infrastructure for genuine strategic freedom.

PHASE ONE

1 The Audit — Identifying the Bottleneck

Before you can delegate effectively, you need a clear picture of where your time and mental energy are actually going. Most executives are shocked by what the data reveals.

The 2-Week Time Audit **PRIORITY**

Track every task you perform for 14 consecutive days. Label each one using the three zones below — be ruthlessly honest.



Zone of Genius

Only you can do this — fundraising, board relationships, high-level strategy.



Zone of Competence

You do it well, but someone trained with clear standards could handle it.



Zone of Fatigue

Administrative tasks that drain energy disproportionate to their value.

Identify Low-Value High-Frequency (LVHF) Tasks **SILENT KILLERS**

Recurring tasks that consume hours weekly but feel minor individually. Common LVHF tasks:

- **Scheduling & calendar management** — back-and-forth booking, rescheduling, reminders
- **Travel coordination** — flights, hotels, transfers, itineraries
- **Email triage** — sorting, flagging, responding to routine inquiries
- **Report compilation** — gathering data from multiple sources into a standard format

Map the Decision Tree

List the top 10 recurring decisions you make each week. For each one, ask: "Could my EA handle this if I gave them a clear If/Then rule?" Most executives find 60–70% can be fully delegated once rules are documented.

- Example: **If a meeting request comes from a prospective client, accept and route to Thursday afternoon.**
- Example: **If a vendor invoice is under \$500 and within approved categories, approve without escalation.**

PHASE TWO

2 Strategic Setup — The Infrastructure

Delegation fails without shared systems. This phase builds the operating architecture between you and your EA — protocols, structures, and rules that allow work to flow without you becoming the bottleneck.

Establish the Gatekeeper Protocol

Define who has direct access to you and what triggers each type of response.

- **Tier 1 (Direct Access):** Board members, direct reports, named family contacts
- **Tier 2 (Routed through EA):** Vendors, clients, media, general staff inquiries

- **Emergency criteria:** Define this in writing. "Urgent" is not an emergency — an emergency is a named, specific scenario requiring your immediate decision.

Implement Email Triage — The Three-Folder System HIGH IMPACT

Your EA manages the inbox daily. You only interact with Folder A.

A

Urgent — Act Today

Requires executive decision before end of day.

B

Review — Read Later

FYI or low-urgency. Review at end of day only.

C

EA Handled — Approve

Drafted responses ready for a single approval click.

Calendar Density Management — Move to a Thematic Calendar

Replace the reactive "first come, first served" calendar with intentional time architecture. Your EA books accordingly and protects Deep Work blocks as non-negotiable.

- **Monday:** Deep Work — no meetings before noon
- **Tuesday:** External Meetings — client calls, partnerships, media
- **Wednesday:** Internal — team reviews, one-on-ones, operational check-ins
- **Thursday:** Flexible / Growth — learning, recruiting, pipeline
- **Friday:** Planning + Admin — weekly review, priorities, inbox clearance

PHASE THREE

3 The Execution — Human-in-the-Loop

This is where delegation shifts from task-based to outcome-based. You stop handing off to-dos and start handing off accountability — with the right guardrails in place.

 The "Record, Don't Write" Rule

Stop writing SOPs from scratch — it's slow and rarely captures nuance. Record a Loom or Zoom of yourself performing a task once. Your EA transcribes it into a formal process document you then review and approve. You gain a living SOP library with zero documentation overhead.

 Define the Level of Authority for Every Delegated Task **CRITICAL**

Ambiguity is the #1 reason delegation fails. For every task you hand off, specify the authority level — never leave this undefined.

1 Research & Report

EA gathers information. Executive makes the final decision.

2 Research & Recommend

EA presents a recommendation. Executive gives final approval.

3 Act & Notify

EA takes action and informs executive afterward. No approval needed.

4 Fully Autonomous

EA owns the outcome completely. Executive not involved unless escalated.

 Build a Decision Matrix — Your EA's Rulebook

Create a running document of past decisions with the reasoning behind each one. This becomes your EA's reference library — they stop asking and start acting.

- Format: "If [situation], then [action], because [reason]."
- Example: **If a client requests a discount above 15%, escalate — we never negotiate pricing via email.**
- Example: **If a media inquiry arrives, request deadline and publication, then escalate. Respond within 24 hours.**

PHASE FOUR

4 Feedback Loops — Optimization

A delegation system is never "set and forget." It requires a recurring rhythm of alignment, calibration, and trust-building — especially in the first 90 days.

 The Daily 15-Minute Sync

A rapid-fire morning or evening huddle with your EA. Agenda: blockers first, then priorities for the next 24 hours, then any decisions needing your input. Keep it tight and daily — consistency compounds.

 Weekly Strategy Deep Dive

A 30–45 minute session each Friday to review Calendar Friction — meetings scheduled incorrectly, unnecessary escalations, and processes that need refinement. This is where your system gets smarter week over week.

 The Shadowing Phase — For Complex Task Handoffs

For high-judgment tasks (ghostwriting, CRM management, stakeholder communication), run a structured 2-week shadow phase. Week 1: EA observes and documents. Week 2: EA does and you review. After that, they own it at Level 3 or 4 authority.

CRITICAL SUCCESS METRIC

The 48-Hour Vacation Test

You have successfully implemented this system when you can step away for 48 hours without your inbox exploding, operations stalling, or your team reaching out in a panic. If the business survives and thrives in your absence — your delegation infrastructure is working. Run this test intentionally at the 30-day and 90-day marks. If you fail it, the feedback tells you exactly which phase needs work.

Inbox Under Control

Zero Operational Stalls

Zero Panic Escalations

Decision Flow Optimised

Ready to hire an Executive Assistant who can run this system?

Aristo Sourcing places pre-vetted EAs from South Africa and the Philippines — specialists in executive support, operations, and delegation management.

[GET STARTED](#)