

WORKBOOK

Mastering Delegation to Scale Your Home Care Business



Welcome Message

Congratulations on taking the first step toward reclaiming your time and scaling your business! This workbook is designed to help you implement the strategies we discussed during the mastermind. By completing the exercises and action items, you'll gain clarity, build systems, and create a business that works for you—not the other way around.

SECTION 1 UNDERSTANDING YOUR HOURLY VALUE

Exercise: Calculate Your Hourly Value

1. Write down your annual income goal: \$ _____
2. Write down the number of hours you want to work in a year: _____
(Example: 40 hours/week x 50 weeks = 2,000 hours)
3. Divide your income goal by your work hours:
Hourly Value = \$ _____ /hour

Reflection Questions:

- Are you spending your time on tasks that match or exceed your hourly value?
- What tasks are you currently doing that could be delegated to someone else for less than your hourly value?

Action Item:

List 3 tasks you currently handle that are below your hourly value:

1. _____
2. _____
3. _____

Resources:

1. "The 80/20 Rule: How to Work Less and Achieve More" by Brian Tracy (Duration: 12 minutes)
 - A practical explanation of the Pareto Principle and how to apply it to your work.
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SECTION 2 THE BUY BACK LOOP: AUDIT, TRANSFER, FILL

Step 1 Audit

Task 1: Open your calendar, add a new event for next week called **"Audit your time"**

Task 2: Create a List

Column 1: High Value - the **20% of your activities** that drives your growth and need personal expertise.

Column 2: Low Value - the **80% of your tasks** that are necessary but could delegate or outsourced.

Task 3: Write down every tasks you handle daily for atleast 3 to 5 days.

Task 4: Determine if you can delegate these tasks based on your hourly value.

Time	Activity	Value (High/Low)	Delegate? (Yes/No)
8:00- 9:00 AM	Responding to emails	(Low) / High	(Yes) / No
9:00 AM		Low / High	Yes / No
10:00 AM		Low / High	Yes / No
11:00 AM		Low / High	Yes / No
12:00 PM		Low / High	Yes / No
1:00 PM		Low / High	Yes / No
2:00 PM		Low / High	Yes / No
3:00 PM		Low / High	Yes / No
4:00 PM		Low / High	Yes / No
5:00 PM		Low / High	Yes / No
6:00 PM		Low / High	Yes / No
7:00 PM - 12:00 AM		Low / High	Yes / No

Reflection Questions:

1. Which tasks drain your energy or take up too much time?
2. Are there repetitive tasks that could be systematized or automated?

Resources:

1. **"The Buy Back Principle Explained" by Dan Martell**(Duration: 15 minutes)
A visual breakdown of the Buy Back Loop and how to implement it in your business.
2. **Time Audit Template**
A downloadable spreadsheet to track and analyze how you spend your time.

SECTION 2 **THE BUY BACK LOOP: AUDIT, TRANSFER, FILL**

Step 2 Transfer

Transfer Tasks

Exercise: Delegation Plan

For each task you identified as “Low Value” or “Delegate,” create a plan to transfer it.

Task	Who Can Handle It?	Tools/Resources Needed	Deadline to Delegate
Scheduling	Recruiting Virtual Assistant	AI SCREENING TOOL	January 5,2025
Increase Revenue	Business Development	CRM	January 12, 2025
Task Coordination & Tracking	Project Manager or Intake Coordinator VA	Project Management Tools	January 19, 2025

Action Item:

Identify one task to delegate this week and take action to transfer it.

Resources:

- **“How to Delegate Effectively as a Leader”**
by Simon Sinek(Duration: 10 minutes)

Learn the mindset and strategies for empowering your team through delegation.

- **Delegation Checklist**

Create an SOP (Standard Operating Procedure)

Choose one task you want to delegate and create a simple SOP for it

Task: Recruiting

Step 1: Create an Indeed Job Posting

Step 2: Respond to Applicants

Step 3: Time block for Interviews

Step 4: Send Paperwork to qualified applicants

Step 5: Conduct reference and background checks

Step 3 *Fill Your Time*

Exercise: High-Value Activities

List 3 high-value activities you can focus on once you've delegated low-value tasks:

1. _____
2. _____
3. _____

Examples of High-Value Activities in Home Care:

- **Building referral partnerships** with hospitals or senior living communities.
- **Actively building power partnerships** with referral sources like hospitals, rehab centers, hospice agencies, and senior living communities.
- **Attending industry conferences**—not just showing up but actually having the bandwidth to focus, absorb new insights, and stay ahead of trends and regulations.
- **Expanding your services** by developing specialized care offerings, such as dementia care or post-surgical recovery programs, to set your agency apart.
- **Strengthening community ties and giving back**, ensuring your agency is seen as a trusted and engaged partner in your local area.
- **Refining your agency's brand and culture** to attract and retain not just clients, but also exceptional caregivers and staff.
- **Investing in yourself** by mastering a new leadership skill, like public speaking, or refining your ability to inspire your team.

Step 4 Repeat with your high value individuals

Step 5 Compare Results and build a plan

Resources:

1. Deep Work: Rules for Focused Success in a Distracted World" by Cal Newport(Duration: 18 minutes)
- A summary of the key principles from the book Deep Work.

***SECTION 3* TOOLS AND RESOURCES**

Recommended Tools for Delegation

- **Project Management:** Trello, Asana, ClickUp
- **Communication:** Slack, Zoom, Microsoft Teams
- **Scheduling:** Calendly, Google Calendar
- **Automation:** Zapier, HubSpot, ActiveCampaign
- **Document Sharing:** Google Drive, Dropbox

Action Item:

Choose one tool to implement this week to streamline your operations.



top6

WAYS TO USE A VIRTUAL ASSISTANT FOR YOUR HOME CARE BUSINESS

1. Virtual Recruiter

4. Intake Coordinator

2. Scheduling Coordinator

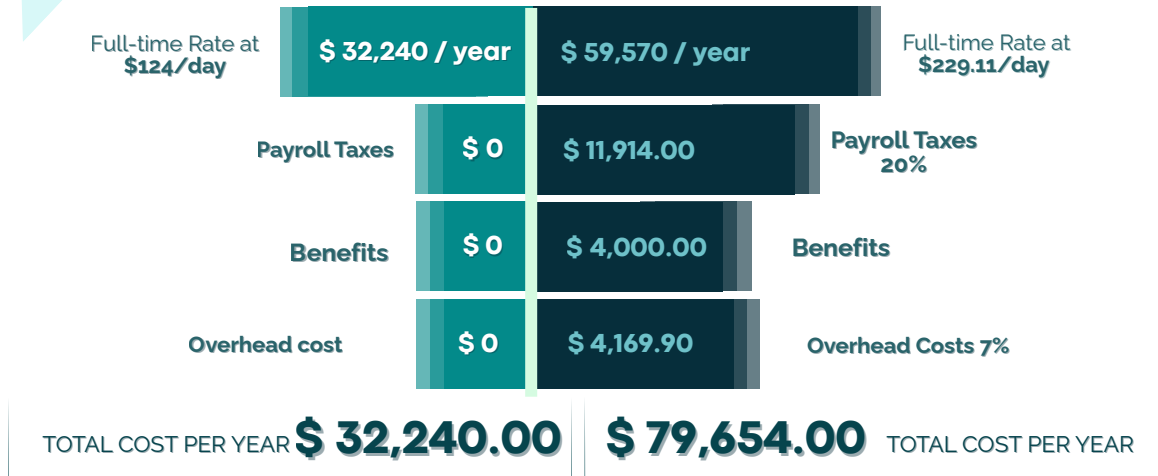
5. Virtual Receptionist

3. After-hours & On-call Assistant

6. Sales Assistant

COST COMPARISON

Virtual Assistant VS In-House Employee



58.89% TOTAL COST SAVINGS

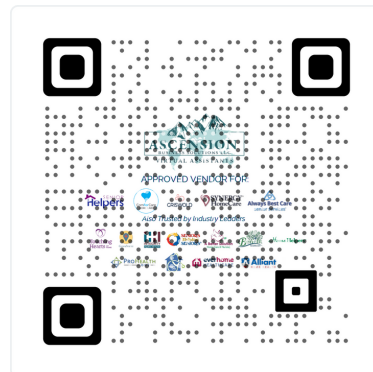
Closing Message

Remember, delegation is not about losing control—it's about creating space for what truly matters.

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