



Mastering Delegation to Scale Your Home Care Business

WORKBOOK



Welcome Message

Congratulations on taking the first step towards 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 Rate

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 rate:

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

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 drives your growth and need personal expertise

Task 3: Write down every tasks you handle daily for at least 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 AM – 9:00 AM	Responding to emails	High / Low	Yes / No
9:00 AM		High / Low	Yes / No
10:00 AM		High / Low	Yes / No
11:00 AM		High / Low	Yes / No
12:00 NN		High / Low	Yes / No
1:00 PM		High / Low	Yes / No
2:00 PM		High / Low	Yes / No
3:00 PM		High / Low	Yes / No
4:00 PM		High / Low	Yes / No
5:00 PM		High / Low	Yes / No
6:00 PM		High / Low	Yes / No
7:00 PM – 12:00 MN		High / Low	Yes / No

Reflection Questions

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

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

Step 2 — Transfer

Transfer tasks

Exercise: Delegation Plan

For each tasks 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:

1. **How to Delegate Effectively as a Leader** by Simon Sinek (Duration: 10 minutes)
 - Learn the mindset and strategies for empowering your team through delegation

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 checks¹

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:

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 postsurgical 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 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

Top 6 Ways to use a Virtual Assistant for your Home Care Business



Virtual Recruiter



Intake Coordinator



Scheduling Coordinator



Virtual Receptionist



After Hours &
On Call Assistant



Sales Assistant

Cost Comparison

57.6% Total Cost Savings

Virtual Recruiter
Ascension Business Solutions

vs.

In-House Recruiter
In Greater Chicago

In-House Recruiter

Total Cost:
\$76,553/ Year

Includes Taxes,
Benefits & Admin

ABS Virtual Recruiter

Total Cost:
\$32,240/ Year

- \$ 0 Payroll Taxes
- \$ 0 Benefits
- \$ 0 Admin Costs

Total Cost per Year: \$ 76,553

Total Cost per Year: \$ 32,240.00

Closing Message

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



ABS Website



Strategy Call



Our Portfolio



Learning Vault

