ExecWing

The Delegation Playbook for CEOs

A practical framework for deciding what to hand off, writing it down and keeping quality high.

1. Run a one-week time audit

For five working days, log every task in 30-minute blocks. Tag each one with an owner: **Only me**, **Could be taught** or **Shouldn't be done at all**.

- Mark recurring tasks (daily, weekly, monthly).
- Note which tools each task lives in.
- Estimate how long each task takes and how often it repeats.

2. Sort with the 4D filter

Bucket	What it means	Example
Delete	Low value, nobody will miss it	Status reports no one reads
Delegate	Repeatable and teachable	Calendar, CRM updates, invoicing
Defer	Matters, but not now	Tool migration
Do	Needs your judgment or relationships	Key customer calls, hiring decisions

3. Write a one-page SOP for each delegated task

- Purpose: why the task exists and what good looks like.
- Trigger: when it happens (time, event, request).
- Steps: numbered, with screenshots or a short screen recording.
- Access: exactly which systems and permission levels are needed.
- Escalation: what to do when something is unusual, and who decides.
- Done definition: the measurable output you expect.

4. Set decision rights

Agree in writing what your assistant can do without asking (for example, accept internal meetings), what they draft for approval (external emails, payments) and what they never do (sign contracts, move money).

5. Build a review rhythm

- Daily: a short async update covering done, next and blocked.
- Weekly: 30-minute check-in; review a sample of output against the SOP.

- Monthly: decide the next set of tasks to hand off.

6. Your first-30-days checklist

- ☐ Time audit completed and tasks sorted
- ☐ Top 5 delegated tasks have written SOPs
- ☐ Least-privilege access set up with MFA
- ☐ Decision rights documented
- ☐ Daily update and weekly check-in scheduled
- ☐ Day-30 review booked

Next step

Take the free delegation audit at execwing.com/delegation-audit/ or schedule a Free Consultation at execwing.com/book/.

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