

ROLE TRANSITION PLANNER

Delegate So It Stays Delegated

Hand off one responsibility at a time, with the context and authority that makes it stick.

WHY THIS MATTERS

Delegation fails when it is a dump: work moves without context, authority, or accountability. This planner structures the handoff so what you delegate actually stays delegated. One task at a time.

Role or responsibility being transitioned from

.....
e.g. Founder handling all sales conversations

Target completion date

.....
e.g. July 31, 2026

TASK AND RESPONSIBILITY DELEGATION LIST

Task / Responsibility	Hrs/Wk	Delegate To (Role)	By When	SOP First?	Status
<i>Run weekly sales follow-up calls</i>	<i>3</i>	<i>Sales Rep (hire Q3)</i>	<i>Jul 31</i>	<i>Y</i>	<i>Pending</i>

THE PART MOST FOUNDERS SKIP

Delegation does not fail on the plan. It fails the first time the work comes back at 80 percent and you take it back. The moment you redo it, you have taught them you are still the owner, and they stop trying. Hand over the context and the authority, then let it be done differently than you would do it. Your job is to check the result, not to re-run the task.

BEFORE YOU HAND OFF

What is the biggest risk in this transition?

.....

What knowledge only I have needs to be written down first?

.....

What is the first task to delegate, and why?

.....

Who needs to be informed or trained before handoff?

.....

WEEKLY HOURS, BEFORE AND AFTER

Category	Hours / Week (Now)	Hours / Week (Target)	Delta
Revenue-Generating Work			
Operations / Fulfillment			
Admin / Finance / HR			
Strategic / Planning			
Total			

If you are in more than 40 hours of non-strategic work per week, your first hire is not a salesperson. It is an operator.

NEXT

Pick one task to delegate this week. Tell the person the why, not just the what. Start there.

Want a full role-transition plan built around your exit? Scan the code or visit freedomsystems.biz to book a 30-minute diagnostic.

