

APEX ACADEMY

The Educational Division of Apex Ledger Group LLC

AA-FM-011 · OPERATIONS TRACK · FIELD MANUAL

The Delegation Planner

Deciding what to hand off, to whom, and how to make the handoff actually stick.

Systems outperform heroic effort.

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AA-FM-011 · First issued as part of the Apex Academy Free Resource Library.

Field Manual Details

Field Manual Number	AA-FM-011
Track Classification	Operations
Difficulty Level	Intermediate
Estimated Completion Time	25–30 minutes
Prerequisite Manuals	AA-FM-007 — The Business Goal Planner (recommended, not required)
Intended Audience	Owners who know intellectually they should delegate more but struggle to actually do it

Executive Summary

This Field Manual helps you identify what's worth delegating, decide who should own it, and build a handoff plan that actually sticks. It applies the Decision Ladder™ to each delegated task and builds Team Capacity — the second layer of the Capacity Pyramid™.

Learning Objectives

- Name three tasks worth delegating, each with a clear handoff plan.
- Assign each task its correct rung on the Decision Ladder™.
- Identify what training is needed before the handoff, not after it fails.

Educational Introduction

Delegation Fails at the Handoff, Not the Decision

Most owners already know, in general terms, that they should delegate more. The gap usually isn't awareness — it's the handoff itself. A task gets handed off with too little context, no clear definition of success, and no follow-up, so it either bounces back to the owner or gets done in a way that creates new problems.

Good delegation is a small system: choose the right task, choose the right person, define what success looks like, and check in at a set point rather than hovering or disappearing entirely.

Not everything should be delegated. This planner starts with a filter — because delegating the wrong thing badly is often worse than not delegating at all.

APEX PRINCIPLE

Systems outperform heroic effort.

How to Use This Manual

- Run each candidate task through the Delegation Filter before committing to it.
- Be specific about what "done well" looks like — vague expectations are a common cause of delegation failure.
- Build in one check-in point, especially for the first handoff of a new task.
- Expect the first attempt to take longer than doing it yourself — that's the cost of building the system, not a sign it failed.

Core Framework: The Decision Ladder™

Every delegated task sits on one of four rungs, and naming the rung up front prevents the two most common delegation failures: holding on too tightly, or letting go with no oversight at all.

- Rung 1 — Owner Must Decide (not a delegation candidate at all).
- Rung 2 — Owner Decides With Input (partial delegation — team gathers information, owner still calls it).
- Rung 3 — Team Decides, Owner Informed (a strong delegation target).
- Rung 4 — Team Fully Owns (full delegation, once trust is established).

APEX INSIGHT

Owners rarely have a trust problem. They usually have an unassigned-rung problem disguised as a trust problem.

The Worksheet

Delegation Filter

✓	Delegation Filter	Notes
☐	This task doesn't require a decision only I'm equipped to make.	
☐	This task is done often enough to be worth someone else learning it.	
☐	I can clearly describe what "done well" looks like for this task.	
☐	Someone on the team has the capacity or aptitude to take it on.	

COMMON MISTAKE

Skipping the filter and delegating on instinct is how the wrong tasks end up delegated badly, souring an owner on delegation entirely.

Your Delegation Plan

List up to three tasks that passed the filter above.

Task	Delegate To	Decision Ladder Rung	Target Handoff Date

Score Summary

For each planned delegation, count how many Delegation Filter boxes it passed (out of 4).

Task	Checked (out of 4)
Task 1	
Task 2	
Task 3	

Interpretation Guide

Score Range	Interpretation
4 checks	Ready to Delegate. Proceed with the handoff plan as written.
2–3 checks	Refine First. Sharpen the definition of "done well" or confirm capacity before handing off.
0–1 checks	Not Yet a Candidate. Keep this task with you for now, or address the gap the filter revealed.

APEX PERSPECTIVE

The first handoff of a new task is always slower than doing it yourself. That's not failure — that's the cost of building Team Capacity.

Reflection Questions

What's a task you've resisted delegating even though it passed the filter? What's really behind that resistance?

Think of a delegation that didn't work in the past. Which part of the handoff was likely missing — context, clarity, or follow-up?

CEO Notes

Track how each handoff actually goes, so future delegation decisions get easier and faster.

WATCH FOR THIS

If you find yourself checking in on a delegated task daily, you likely assigned it the wrong Decision Ladder rung — either drop it to Rung 2 explicitly, or commit to letting it run at the rung you chose.

Your Next 30-Minute Win

Take your highest-scoring task from the Score Summary and have the actual handoff conversation today — not scheduled for later, today. Tell the person what success looks like, name the Decision Ladder rung out loud, and set one specific check-in date.

Key Takeaways

- Delegation usually fails at the handoff, not the decision to delegate.
- Vague expectations are one of the most common causes of a delegation "not working."
- The first handoff of a new task is slower than doing it yourself — that's the cost of building the system.

Recommended Next Field Manual

Field Manual	AA-FM-012 — The Time Audit Worksheet
Estimated Time	5 minutes a day for one week; 20 minutes to review
Why This Is Next	Because you've started delegating, your next step is confirming whether your own time actually shifted toward what only you can do.

Additional Learning Resources

Expands Into (Paid)	The Leadership Capacity Workbook — a deeper program on building a team that
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Workbook)	can absorb delegated ownership.
Complementary Workshop	"Letting Go Without Losing Control" — a live session on delegation and follow-through.
Supports Future Certification	Apex Certified Business Operator — Module 3: Leadership & Sustainable Ownership.

Social Media Companion Content

Theme for this manual: delegation fails at the handoff, not the decision. Practical and reassuring, not guilt-inducing.

LinkedIn

Long-Form Post

Most owners already know they should delegate more. That's rarely the actual gap. The gap is usually the handoff itself — a task handed off with too little context, no clear definition of success, and no follow-up. It either bounces back or gets done in a way that creates new problems. We built AA-FM-011, the Delegation Planner: a quick filter for what's actually worth delegating, plus a simple plan for who, what training, and by when. Systems outperform heroic effort — including the heroic effort of doing everything yourself. Link in comments.

Carousel Outline (6 slides)

- Slide 1 — Hook: "Delegation doesn't fail at the decision. It fails at the handoff."
- Slide 2 — The Delegation Filter, previewed.
- Slide 3 — The Decision Ladder™, applied to delegation.
- Slide 4 — Why the first handoff is always slower.
- Slide 5 — Example delegation plan row.
- Slide 6 — CTA: "Download AA-FM-011, free."

Poll

Question: "What usually stops you from delegating more?" Options: Not enough time to train someone · Trust it'll be done right · Don't know who to give it to

Facebook

Community Post

Be honest: is there a task you know you should hand off but keep doing yourself? We built a free planner that walks through what's actually worth delegating and how to make the handoff stick. Link below if it's useful.

Small Business Discussion Prompt

What's a delegation that eventually worked really well for you — what made the difference?

Story Version (text overlay sequence)

- Frame 1: "Delegation fails at the handoff."
- Frame 2: "Free Delegation Planner."
- Frame 3: "Swipe up — filter, plan, follow through."

Instagram

Carousel Outline (5 slides)

- Slide 1: "You know you should delegate more. Here's why it isn't sticking."
- Slide 2: The Delegation Filter, 4 quick questions.
- Slide 3: "Context. Clarity. Follow-up."

— Slide 4: Pull quote — "Systems outperform heroic effort."

— Slide 5: CTA — link in bio.

Caption

Delegation usually doesn't fail at the decision — it fails at the handoff. This free planner (AA-FM-011) filters what's actually worth delegating, then walks through who, what training, and by when. Link in bio. #delegation #smallbusiness #apexacademy

Reel Script (35 seconds)

0-3s: On camera — "You already know you should delegate more." 3-14s: "The problem usually isn't the decision — it's the handoff." 14-24s: "No context, no clear success, no follow-up — that's why it bounces back." 24-32s: "Free planner fixes the handoff, not just the decision." 32-35s: "Link in bio."

Story Sequence

- Story 1: Question sticker — "What task do you keep doing yourself?"
- Story 2: Poll sticker — "Ever had a delegation totally bounce back? Yes / No"
- Story 3: "Get the free planner" link sticker.

X (Twitter)

Five Short Posts

- Delegation doesn't fail at the decision. It fails at the handoff.
- No context, no clear definition of success, no follow-up — that's why it bounces back.
- The first handoff of a new task is always slower than doing it yourself.
- Not everything should be delegated. Filter first.
- Free Delegation Planner (AA-FM-011) — link below.

Thread (5 tweets)

- 1/ Most owners already know they should delegate more. That's rarely the real gap.
- 2/ The real gap is the handoff — too little context, no clear success definition, no follow-up.
- 3/ Good delegation is a small system: right task, right person, clear success, one check-in.
- 4/ Not every task should be delegated — filter first.
- 5/ Free planner below.

Quote Graphic Caption

"Systems outperform heroic effort." — Apex Academy

YouTube

Video Title	Why Your Delegation Keeps Bouncing Back to You
Thumbnail Text	FIX THE HANDOFF.

10-Minute Educational Outline

- 0:00–1:00 — Hook: why delegation "doesn't work" for most owners.
- 1:00–3:00 — The real gap: the handoff, not the decision.
- 3:00–6:00 — The Delegation Filter, walked through with an example.

- 6:00–8:00 — Applying the Decision Ladder™ to a real task.
- 8:00–9:30 — Introduce AA-FM-011.
- 9:30–10:00 — CTA and picking your first task to delegate.

Call-to-Action

"Grab AA-FM-011, free, in the description — filter one task and build its handoff plan today."

TikTok

Hook (first 2 seconds)

"You already know you should delegate more."

45-Second Script

(0-4s) Hook line, on camera. (4-15s) "The problem usually isn't the decision — it's the handoff." (15-28s) "No context, no clear success, no follow-up — that's why it bounces back." (28-38s) "Free planner fixes the handoff, not just the decision." (38-45s) "Link in bio."

B-Roll Suggestions

- A task literally being handed from one set of hands to another.
- Sticky note with "done well = ____" being filled in.
- Calendar with a check-in date circled.

Closing CTA

"Grab AA-FM-011, free — link in bio."

Email

Subject Line	Why your delegation keeps bouncing back
Preview Text	A free planner that fixes the handoff, not just the decision.

Educational Email

Hi [First Name], Most owners already know, in general terms, that they should delegate more. The real gap usually isn't the decision — it's the handoff. AA-FM-011, the Delegation Planner, starts with a quick filter for what's actually worth delegating, then walks through who should own it, what training they'll need, and a target handoff date. Expect the first handoff of any new task to be slower than doing it yourself. That's the cost of building the system, not a sign it failed. [Download AA-FM-011, free] Calmly, Apex Academy

Printing Recommendations

- US Letter, portrait, single-sided — a planning document, revisited periodically rather than daily.
- Digital-first owners: a shared tracker (spreadsheet or project tool) works well if multiple people are involved in the handoffs.

Canva Layout Specifications

Typography & Layout

- Same navy/gold/off-white system as prior Operations manuals, for track continuity.
- Keep the Delegation Filter visually lightweight — it's a quick gate, not the main worksheet.
- Make the delegation plan table the visual centerpiece, with enough row height for follow-up notes.

Score Interpretation Treatment

- Three-row table here (not four) since this scores readiness per task rather than process maturity — gold-tinted top row reserved for "Ready to Delegate."

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| *Systems outperform heroic effort.*

Continue the journey: AA-FM-012, The Time Audit Worksheet.