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EPI

Season 2

Cheat Sheet

How to 2X Your Output – Without the Burnout

Featuring Peter Morandi

By Rob Levin, Creator of [Greattalentpodcast.com](https://greattalentpodcast.com)
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Strategic delegation transformed Peter's business — doubling estimating capacity and boosting profitability. Now it's your turn.

This workbook will help you reflect, plan, and implement high-impact delegation strategies, especially through **departmental assistants**. Let's dive in.

Section 1: Identify High-Impact Departments

Before you delegate, zoom out. Which departments hold the biggest opportunity for cost savings or revenue growth?

Exercise: Department Prioritization Grid

Department Name	Revenue Growth Potential	Cost Savings Potential

Tip: Focus first on departments where repetitive admin work pulls team members away from revenue-driving tasks.

Section 2: Calculate the Cost of Doing It All

Quantify the true cost of having skilled team members buried in admin tasks.

Exercise: Department Prioritization Grid

- Hourly Rate of Team Member: \$_____
- Admin Hours/Week: _____
- Annual Cost of Admin Work:
 $\text{\$Hourly Rate} \times \text{Hours} \times 52 = \_____

- Missed Opportunity Cost:
Missed Deals × Avg. Revenue/Deal = \$_____
- ROI of Hiring a Departmental Assistant:
Admin Cost + Missed Revenue – Assistant Cost = \$_____

Section 3: Align Work with Unique Abilities

Your best people should be doing their best work — not their own admin.

Self-Assessment: Is Your Team Focused on Their Unique Abilities?

On a scale of 1–5:

1

2

3

4

5

Not at all

Completely focused

List Top 3 Priorities by Department

Department	Priority 1	Priority 2	Priority 3

Bonus Prompt: How often do these priorities get sidetracked by admin work?

Section 4: Department-Wide Task Inventory

Zoom in. What tasks are being done that don't require specialized expertise?

Task Delegation Inventory

Use this section to pinpoint where a departmental assistant could have an immediate impact.

Department	Task	Who Does It Now?	Can It Be Delegated?	Delegate To	Result
<i>Sales</i>	<i>CRM updates</i>	<i>Sales Reps</i>	<i>Yes</i>	<i>Sales Assistant</i>	<i>More selling time</i>
<i>Estimating</i>	<i>Bid gathering</i>	<i>Sales Reps</i>	<i>Yes</i>	<i>Estimating Assistant</i>	<i>More estimates, faster</i>

Section 5: Set Delegation Success Metrics

Peter's team saw real results: more estimates, fewer errors, higher output. Now define your wins.

Delegation Metrics Planner

Department	Goal	Metric	How You'll Track It
<i>Estimating</i>	<i>Increase output</i>	<i># of estimates/week</i>	<i>CRM report</i>
<i>Sales</i>	<i>Free up reps</i>	<i>Hours saved/week</i>	<i>Time logs</i>
<i>Marketing</i>	<i>Improve focus</i>	<i>Campaigns launched/month</i>	<i>Project tracker</i>

Strategic delegation isn't about doing less — it's about making room for **more of the right work.**

Whether it's assigning a Sales Assistant, a Marketing Coordinator, or a Department Admin, the payoff is clarity, efficiency, and growth across your company.

***“There’s no way we could do that kind of work
without having the right support staff”***

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