

THE VA DELEGATION GUIDEBOOK

A little help goes a long way.

Learn how to delegate the busywork, get the right support and make more room for the things that actually matter.

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Hey there!



First things first: You don't have to do it all yourself.

Running a business comes with A LOT of little things to keep up with.

The emails, calendar, content, follow-ups, admin tasks... the list just keeps going. And somehow, it all ends up on your plate.

Even when you know you need help, actually asking for it can feel like more work. You might find yourself thinking, ***It's just easier if I do it myself.***

And to be honest, I get it. You know how you like things done and explaining everything to someone else can feel like a whole project on its own.

But if every little thing still has to go through you, what's the point of having help?

Delegating doesn't mean handing over your whole business and hoping for the best. It's just figuring out what you don't need to handle anymore, finding someone who can help and putting a few simple systems in place.

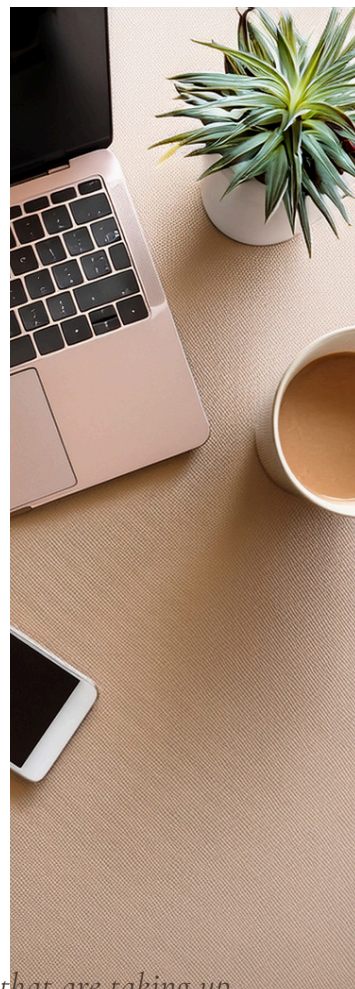
And you don't have to get it all figured out overnight. Start small. Then you can build from there. 🤍

So, what can a VA actually help with?

This will look different for everyone, depending on your business, your needs and your VA's skill set. But here are a few places where having an extra set of hands can make a big difference.

Business and behind-the-scenes

- Managing emails and calendars.
- Organizing files and documents.
- Updating your CRM and tracking follow-ups.
- Research and everyday admin tasks.
- Handling bookkeeping.



Content and marketing

- Editing videos and creating content.
- Drafting captions and social media posts.
- Organizing content calendars.
- Scheduling approved posts.

Personal admin

- Keeping track of appointments and reminders.
- Researching gifts, activities, services, or travel options.
- Helping organize subscriptions and recurring orders.
- Taking some of those little everyday tasks off your mental to-do list.

> *The goal is to find every bit of the things that are taking up your precious time but don't necessarily need your personal attention.*

01 Get everything out of your head

Before you start delegating, figure out what's actually taking up your time.

Think about all those little things you keep remembering, checking and putting off.

Try this: Do a 15-minute brain dump.

You can use the brain dump worksheet on the next page

Write down everything you regularly handle:

- Emails, DMs and follow-ups.
- Scheduling and calendar updates.
- Content creation and publishing.
- Client messages and admin.
- Research and organization.
- Personal appointments and reminders.

> *Set a timer for 15 minutes and write down EVERYTHING you regularly handle.*
>
> *Don't organize it. Don't overthink it. Just get it out of your head.*

NOW, let's figure out what actually needs your attention.

Once you have your list, go through each task and ask yourself whether you want to:

KEEP IT	HAND IT OFF	SIMPLIFY IT	LET IT GO
Needs your expertise or decision.	Someone else can handle it.	A tool or process could help.	It doesn't need to be done.

Not everything needs to be delegated. Sometimes you just need a better system or to stop doing something altogether.

Brain dump worksheet:

What are you ready to get off your plate?

02 Start with three handoffs

Okay, now that you have your list, let's not try to hand over everything at once.

Start with three things you'd love some help with.

You want to choose things that happen regularly and don't require you to make every single decision along the way.

What makes a good first task to delegate?

Look for tasks that:

- Keep showing up on your to-do list.
- Have a clear outcome.
- Can be explained with simple instructions.
- Don't need your input every five minutes.

Not sure what to delegate?

TASK		HOW YOUR VA CAN HELP
Calendar	⟶	Schedule meetings and organize reminders.
Content	⟶	Sort footage and update content calendars.
Captions	⟶	Draft content using your notes and ideas.
Admin	⟶	Track tasks, deadlines, and follow-ups.
Research	⟶	Compare options and put together a shortlist.

Your first three handoffs

1. _____
2. _____
3. _____

Start small. You can always add more once you find your rhythm.

03 Make the handoff make sense

Here's where a lot of people get stuck.

You know exactly what you want done, but your VA doesn't automatically know what's going on inside your head.

Don't worry. That's totally fine!

The more context you give at the beginning, the less back-and-forth you'll have later.

Instead of sending a quick message that says, *"Can you take care of this?"* try giving your VA a little more direction.

Use the CLEAR method.

C — Context

Why are we doing this? What's the background?

L — List the steps

What needs to happen? Share any instructions, links or examples.

E — End result

What should the finished task look like?

A — Authority

What can your VA decide independently and what needs your approval?

R — Return date

When do you need it completed? Is there an earlier draft deadline?

So let's say you're delegating a Reel edit.

Instead of saying, "Can you edit this video?"

Try:

Context: I want this to feel natural and conversational, like something I'd actually say. Nothing too scripted or overly polished.

Steps: Review the footage, pull out the best moments, make clean cuts, add captions and export in 9:16.

End result: One review-ready video uploaded to our shared folder with a clear file name.

Authority: You can make the usual editing decisions, but please check with me before changing the main message or publishing anything.

Return date: I'd love to review the first draft by Thursday at noon.

This is what you can tell your VA,

> *Please edit this into a short Instagram Reel. Keep it conversational, use clean cuts, add readable captions and upload a draft by Thursday. Please send it to me for approval before publishing.*

See the difference?

And whenever possible, share examples. A screenshot, sample caption or video can explain your preferences much faster than a long message.

Clear instructions now = less back-and-forth later.

04 Find a communication rhythm that works

You want to know what's happening in your business without having to check on every little thing.

And your VA needs to know when to ask questions, where to send updates and what actually needs your attention.

This is why having a communication routine matters.

You don't need to be messaging each other every five minutes. You just need a system that keeps everyone on the same page.

A few things to agree on from the beginning:

- Where should everyday updates and questions go?
- Where will tasks and deadlines be tracked?
- What are your VA's working hours?
- How quickly should you both expect replies?
- What counts as urgent?
- When will you review work and discuss priorities?
- How should approvals and feedback be handled?

Make you weekly rhythm:

WHEN	WHAT TO COVER
Start of the week	Go over priorities, deadlines and anything that needs to get done.
Midweek	Quick check-in. What's moving along? Is anything stuck?
End of the week	Review what's completed, what's still in progress and what's coming next.

Or you can keep your weekly updates simple:

UPDATE	WHAT TO INCLUDE
Done	Completed tasks.
In progress	What's being worked on.
Need your input	Questions or approvals.
Coming up	Upcoming priorites.
Blocked	Anything holding things up.



And one more thing: Communication goes both ways.

Your VA shouldn't be left guessing, but you shouldn't have to chase every update either.

If something isn't clear, ask. If a deadline needs to change, communicate that early. And if your priorities shift (because let's be real, they sometimes do!), please make sure your VA knows.

The more open you are with each other, the easier it becomes to build trust, avoid unnecessary back-and-forth and actually enjoy working together.

> *You want a VA who can take things off your plate, not another person you have to constantly manage.*

05 Make the repeat stuff repeatable

If you're explaining the same task every single week, it's probably time to write it down.

I know, I know. Another thing to add to your to-do list.

But creating a simple process now can save you so much time later.

And before you imagine some giant, complicated instruction manual, let me stop you.

An SOP (Standard Operating Procedure) doesn't have to be fancy. It can be a simple checklist, a Google Doc or even a screen recording showing your VA how you do something.

The important thing is that the instructions are easy to follow.

Your simple SOP checklist

SECTION	WHAT TO INCLUDE
Task name	What are we calling this process?
Why it matters	What is this task supposed to accomplish?
When to do it	Is it daily, weekly, monthly or as needed?
Tools and links	Which apps, folders and templates are needed?
Steps	What needs to happen, in order?
Quality check	What should be reviewed before it's marked complete?
Approval needed	What needs your approval before moving forward?
If something goes wrong	Who should be notified and what should be paused?

Feedback is part of the process.

Your VA isn't going to know every preference right away. And that's completely normal.

The trick is to give feedback that's clear enough to help them improve.

So instead of saying:

> *- I don't really like this*

Try:

- "I love the overall direction. Can we make the opening a little shorter?"
- "This is great! Let's keep this editing style for future videos."
- "Could we make the wording a little more conversational?"
- "I prefer the second example. Let's use that as our reference moving forward."

Remember, you don't have to get everything right on the first try. You're both learning how to work together.

The more you communicate, the easier it gets.



06 Share access, but keep good boundaries

Your VA will probably need access to some of your tools, accounts and files to get things done. But that doesn't mean they need access to EVERYTHING *(not unless you want to)*.

Take a little time to figure out what they actually need for their role and what should stay private. So for example, if they're managing your emails or social media, they only need access to the accounts and tools related to those tasks.

It's also a good idea to set clear boundaries around what they can view, edit or manage and which things still need your approval. This way, you're not constantly worrying about who has access to what and your VA knows exactly what they can work on without having to guess.

A little setup now can save you a lot of back-and-forth later!

A few things to keep in mind:

- Use individual accounts and give access based on what the task actually requires.
- Share passwords through a secure password manager, not random messages.
- Turn on two-factor authentication whenever possible.
- Only share access to the folders and tools your VA needs.
- Agree on spending limits and approval requirements.
- Be clear about what can be published, sent, purchased or changed without your approval.
- Review access whenever responsibilities change or the working relationship ends.

Make the boundaries very clear.

YOUR VA CAN USUALLY...	CHECK WITH YOU BEFORE...
Organize files and folders	Deleting important or original files.
Prepare content drafts	Publishing anything that hasn't been approved.
Research products and services	Making purchases or signing up for services.
Add confirmed appointments to your calendar	Accepting or declining important invitations.
Organize routine messages	Responding to sensitive personal, financial or legal matters.

> *The point isn't about micromanaging every little thing your VA does. It's just about making sure you both know what's okay, what's off-limits and when they need to check in with you.*



When those expectations are clear from the start, your VA can feel more confident taking ownership of their tasks without having to stop and ask you about every little thing.

And you won't have to worry about constantly checking in either.

It's a win-win!

07 Your first 30 days together



Let's not put pressure on the first week to be perfect.

Getting comfortable working together takes time. Your VA is learning your preferences, your business and how you like things done. You're learning what you can comfortably hand over, too.

Give yourselves a little room to figure it out.

Here's a simple way to approach your first month:

WHEN	FOCUS	WHAT TO INCLUDE
Week 1	*Get aligned*	Share priorities, tools, preferences, examples and your first few tasks.
Week 2	*Try the handoffs*	Review the first drafts, answer questions and clarify expectations.
Week 3	*Find your rhythm*	Repeat what's working and document tasks that come up regularly.
Week 4	*Adjust and build*	Talk about what's working, what needs improvement and what you can delegate next.



At the end of the month, ask yourself:

- What's taking less of my time now?
- Are deadlines and priorities clear?
- Does my VA have the information and access they need?
- Am I still holding on to tasks I could hand over?
- What preferences or instructions should we document?
- What's one more thing I could confidently delegate?

A little reminder:

Success isn't just about how many tasks get checked off your list or how busy you are every single day.

It's also about having more time to focus on the bigger picture, work on the parts of your business that actually need YOU, spend time with your family, take a break or simply step away without feeling like everything is going to fall apart if you're not available.

Because let's be honest, being the person who handles **EVERYTHING** can get exhausting. And you didn't start your business just to spend all your time buried in emails, admin work and a never-ending to-do list.

Having the right support should give you a little breathing room. It should help you feel less overwhelmed and give you the freedom to focus on what matters most.

That's what having support should help you create. Not just a shorter to-do list, but more time and space to actually enjoy the business and life you're building.

08 Copy, paste and make it your own

Need help figuring out what to say? Start with these.

1. Handing over a new task
"Hey [name]! I'd love for you to take the lead on [task]. Here's a little background on what I need and what the finished result should look like: [details/links]. Ideally, I'd love to have this by [deadline]. Let me know if you have any questions before getting started!"

2. Asking for a first draft
"Could you put together a first draft of [deliverable] using the notes and examples I've shared? I'd love to review the direction first and then we can use that as a reference moving forward. If anything isn't clear, just ask!"

3. Setting boundaries
"You're good to handle [tasks/actions] independently. For anything involving [specific action], please check with me first. If something comes up that isn't covered here, just pause and send me a quick message so we can figure it out."

4. Checking on a deadline
"Hey! Just checking in on [task]. Are we still on track for [deadline]? If anything is holding things up, let me know. Happy to help figure out what we need to do to keep things moving."

5. Giving feedback
"Thank you for putting this together! I really like [specific detail]. Could we tweak [specific part] a little so it feels more [direction]? For the next round, let's use [example] as our reference."

6. Resetting weekly priorities
"Let's take a look at what's on our list this week. These are the main priorities I'd love to focus on: [list]. If the workload or timing feels like too much, let me know early so we can adjust. I'd rather we have a clear plan than try to squeeze everything in."



You've made it through the guide!

Now let's put it into action.

You don't need to change your entire workflow tomorrow.

Just pick one task you've been holding onto and ask yourself:

> *Could someone else help me with this?*

If the answer is yes, that's a good place to start.

My first handoff

- ✓ The task I want to hand off:
- ✓ Why I want this off my plate:
- ✓ What a good result looks like:
- ✓ What needs my approval:
- ✓ The deadline or check-in date:
- ✓ What my VA can handle independently:
- ✓ What information, tools or examples my VA needs:

A few things to remember:

- Start small. You can always delegate more as you get comfortable.
- Explain what you need and why it matters.
- Share examples instead of expecting someone to guess your preferences.
- Be clear about deadlines and approvals.
- Give feedback that helps your VA improve.
- Communicate regularly, but give them room to do their job.

And most importantly, stop feeling like you have to be the person doing absolutely everything.

You can still be involved in your business without being responsible for every single task.

You can still be a great business owner and ask for help.

Ready for a little more support?

Sometimes the hardest part isn't knowing you need help. It's figuring out what kind of help you actually need and finding the right person to support you.

That's where having the right team matters.

If you're ready to get some things off your plate and make more room for the work you actually want to focus on, I'd love for you to connect with **Nexus Point**.

Book a FREE discovery call and let's talk about what kind of VA support could make sense for your business.

 BOOK MY CALL NOW 

Get the support you need so you can focus on what matters.



About Me

I'm Chelsea Haines.

I've learned that building a business doesn't mean you have to do everything yourself.

Between living abroad, raising a family and managing all the moving pieces of my life and my business, I've learned firsthand how easy it is to end up doing too much, trying to keep track of everything or simply feeling like there's never enough time.

To tell you the truth, you don't have to keep doing it all.

Having the right support can make such a difference. But knowing what to delegate and how to work well with a VA doesn't always come naturally.

That's the reason why I put this guide together.

I wanted to create something practical to help you get things out of your head, hand off tasks with more confidence and of course build a working relationship that actually makes your day-to-day easier.

I really do hope this guide helps you create a little more breathing room in your business, so you can spend less time managing every little thing and more time focusing on what matters most.

Always keep in mind that you deserve support too. 🤍

xo, Chelsea H.



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NEXUS POINT