Move at Pace

The Owner Extraction Checklist

A proven system to remove yourself from day-to-day operations and build a business that runs without you.

BY CONNOR MCAULEY | MOVE AT PACE

The Delegation Ladder™

For each task you delegate, move through these 4 levels:

LEVEL	WHAT HAPPENS	DURATION
Level 1	You do it	Current state
Level 2	You do it, they watch	1 week
Level 3	They do it, you watch	1 week
Level 4	They do it, you review results	Ongoing

RULE Don't skip levels. Each task needs to progress through all four.

WEEKS 1-2 **Audit**	WEEKS 3-4 Document	WEEKS 5-12 Delegate

Audit

Time Tracking Checklist

Track every task for 2 weeks. For each, note:

- ☐ What you did
- ☐ How long it took
- ☐ Could someone else do this? (Y/N)

Identify Your Top 3 Time Drains

#	TASK	HRS/WEEK	DELEGATABLE?
1	Enter task...	—	Yes / No
2	Enter task...	—	Yes / No
3	Enter task...	—	Yes / No

TOTAL HOURS TO RECLAIM

e.g. 15 hours

PHASE 2 — WEEKS 3-4

Document

SOP Template

One page per task. Fill in for each of your top 3 time drains:

TASK NAME

e.g. Weekly client reporting

TRIGGER — WHAT KICKS OFF THIS TASK?

e.g. Every Monday at 9am, or when a client emails...

STEPS

01   First step...

02   Second step...

03   Third step...

04   Fourth step...

05   Fifth step...

DONE LOOKS LIKE

Describe the successful outcome...

ESCALATE TO YOU IF

e.g. Client is unhappy, budget exceeds $X...

Documentation Checklist

- [ ] Task 1 SOP written
- [ ] Task 2 SOP written
- [ ] Task 3 SOP written
- [ ] All SOPs stored in shared location
- [ ] Team member identified for each task

PHASE 3 — WEEKS 5-12

Delegate

TASK 1 Enter task name...

WEEK	LEVEL	DONE
Week 5	Level 2: You do, they watch	☐
Week 6	Level 3: They do, you watch	☐
Week 7	Level 4: They do, you review	☐
Week 8	Fully delegated	☐

TASK 2 Enter task name...

WEEK	LEVEL	DONE
Week 7	Level 2: You do, they watch	☐
Week 8	Level 3: They do, you watch	☐
Week 9	Level 4: They do, you review	☐
Week 10	Fully delegated	☐

TASK 3 Enter task name...

WEEK	LEVEL	DONE
Week 9	Level 2: You do, they watch	☐
Week 10	Level 3: They do, you watch	☐
Week 11	Level 4: They do, you review	☐
Week 12	Fully delegated	☐

Delegate vs Keep

DELEGATE THESE FIRST

- [ ] Client status updates
- [ ] Project coordination
- [ ] First-pass quality checks
- [ ] Scheduling and admin
- [ ] Proposal formatting
- [ ] Routine client queries
- [ ] Reporting and dashboards

KEEP THESE (FOR NOW)

- [ ] Strategy development
- [ ] Sales (until process documented)
- [ ] Key client relationships (top 3)
- [ ] Hiring decisions
- [ ] Pricing strategy
- [ ] Business development

The 3 Systems You Need

Before you step back, ensure these are in place:

1 SOPs for Recurring Tasks

- [ ] All delegated tasks have written SOPs
- [ ] SOPs are stored in shared, accessible location
- [ ] Team knows where to find them

2 Decision Trees

- [ ] Common client requests have documented responses
- [ ] Escalation criteria are clear
- [ ] Team knows what they CAN decide without you

3 Weekly Review Rhythm

- [ ] Standing weekly meeting scheduled
- [ ] Agenda template created
- [ ] Results review format defined
- [ ] No daily check-ins (resist the urge)

90-Day Milestone Tracker

WEEK	FOCUS	DONE
1-2	Time audit	☐
3-4	Document top 3 tasks	☐
5-6	Delegate Task 1 (Levels 2-3)	☐
7-8	Task 1 at Level 4 + Start Task 2	☐
9-10	Task 2 at Level 4 + Start Task 3	☐
11-12	Task 3 at Level 4 + All systems live	☐

The Ultimate Test

At the end of 90 days, take 1 week off:

☐ No email

☐ No calls

☐ No Slack

What happened?

If things kept running ➔ You've built something valuable.

If things fell apart ➔ You know what to fix next.

Your Results

HOURS RECLAIMED PER WEEK

_____ hrs / week

TASKS FULLY DELEGATED		NEXT 3 TASKS TO DELEGATE

TASKS FULLY DELEGATED

1. Task name...

2. Task name...

3. Task name...

NEXT 3 TASKS TO DELEGATE

1. Task name...

2. Task name...

3. Task name...

NEXT STEPS

Ready for the Next Level?

Take the Exit Readiness Assessment

See exactly how owner-dependent your agency is and get a personalised gap analysis.

moveatpace.com/assessment →

Book a Discovery Call

Talk through your specific situation and get a roadmap for the next 12 months.

moveatpace.com/book →