



B A S E

The Executive Reflection Workbook: What to Delegate, Why It Matters, and How to Let Go

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The Executive Reflection Workbook

Purpose: This is your leadership pause button. If you're feeling overextended, unsure what to delegate, or craving more clarity in your role—this workbook is for you.

It's designed to help you name what drains you, honor where you're most valuable, and uncover where strategic support could unlock momentum. There are no wrong answers—just honest ones, and a chance to make better choices with your time, energy, and attention.

Part 1: Where you shine—and where you're drained

You can be great at something and still find it draining. This section helps you map what energizes you—and what someone else could handle even better. Recognizing your Zone of Drain is the first step to working smarter.

Instructions:

For each task below, ask yourself:

- How does this make me feel?
- Is this in my Zone of Genius, Zone of Competence, or Zone of Drain?
- Would I delegate it today if I had the right person?

Calendar management is filled out as an example for you.

| Task Category | How It Makes You Feel | Zone (Genius / Competence / Drain) | Delegate? (Yes/No/Maybe) |
|-------------------------------|--|------------------------------------|--------------------------|
| Calendar management | Ex: <i>It doesn't energize me and I'm not that great at keeping up with it</i> | Drain ▾ | Yes ▾ |
| Inbox + communication triage | | Zone? ▾ | Delegate? ▾ |
| Team meeting planning | | Zone? ▾ | Delegate? ▾ |
| Travel & logistics | | Zone? ▾ | Delegate? ▾ |
| Hiring & recruiting support | | Zone? ▾ | Delegate? ▾ |
| Special projects | | Zone? ▾ | Delegate? ▾ |
| Research & insights gathering | | Zone? ▾ | Delegate? ▾ |
| Internal operations | | Zone? ▾ | Delegate? ▾ |
| Client or partner follow-up | | Zone? ▾ | Delegate? ▾ |

| | | | |
|---|--|---------|-------------|
| Social media replies | | Zone? ▾ | Delegate? ▾ |
| Creating decks or other designed materials | | Zone? ▾ | Delegate? ▾ |
| Expense management | | Zone? ▾ | Delegate? ▾ |

Part 2: What’s worth your time?

When you're stretched thin, not all work is equal. This section helps you identify which tasks fuel your impact—and which ones cost you more than they're worth.

Instructions:
Plot some of your most time-consuming or frequent tasks into this quadrant. The goal: notice the mismatch between effort and value.

| High Value / High Enjoyment | High Value / Low Enjoyment |
|-----------------------------|----------------------------|
| | |
| | |
| | |
| | |
| | |
| Low Value / High Enjoyment | Low Value / Low Enjoyment |
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| | |

Prompts:

- What’s something you enjoy but shouldn’t be doing?
- What do you dread, but it must get done?
- What’s something you do because it’s easier than explaining—even though it drains you?

Part 3: What's getting in the way of delegation?

You're not alone. Many leaders struggle to let go—even when they know it's time. Understanding your blockers helps you move through them.

Instructions:

Check your top two blockers.

- ☐ I'm used to doing everything myself
- ☐ I don't trust anyone to do it the way I would
- ☐ It's faster to just do it than explain it
- ☐ I don't know what to delegate
- ☐ I worry about bothering someone
- ☐ Other: _____

Part 4: How much are you really willing to let go?

Control feels safe—but it can also be a bottleneck. This section reveals what you hold tightly and why, so you can build trust where it matters most.

Instructions:

Rate each area on a scale of 1 to 5:

- 1 = I want full control
- 5 = I'm eager to fully hand this off

Use the right-hand column to note any blockers—emotional or practical.

| Task/Area | Control Score (1-5) | What's Holding You Back? |
|----------------------------------|---------------------|--------------------------|
| Scheduling Meetings | Score? ▾ | |
| Writing Drafts/ Emails | Score? ▾ | |
| Project Oversight | Score? ▾ | |
| Team follow-up | Score? ▾ | |
| Inbox management | Score? ▾ | |
| Tracking strategic priorities | Score? ▾ | |
| Business development follow-up | Score? ▾ | |
| Client relationship touch points | Score? ▾ | |
| Planning team events | Score? ▾ | |

Part 5: What you need to thrive with a collaborator (or your executive assistant)

Your team members want to support you fully—but they can't read your mind. Clear preferences create smoother workflows and more trust.

Instructions:

Your team (or EA) can do incredible things—but only if they know how you work best. Pick the options that reflect your style then share your answers with your frequent collaborators.

- **I prefer updates:**
 - ☐ Daily check-ins
 - ☐ A weekly summary
 - ☐ Only when something's off track
- **I like to give feedback:**
 - ☐ In writing
 - ☐ Verbally / on a call
 - ☐ As things come up
 - ☐ Only when asked
- **When I'm at my best:**
 - ☐ Mornings
 - ☐ Afternoons
 - ☐ Evenings
 - ☐ When I'm not overwhelmed
- **[If relevant] I want my EA to:**
 - ☐ Anticipate needs
 - ☐ Follow detailed instructions
 - ☐ Take initiative with boundaries
 - ☐ Ask before changing workflow

Part 6: Reflection and action steps

Awareness is only powerful when it leads to action. Use this section to connect insight with intention—and take your first next step.

Instructions:

Now that you've looked honestly at how you work, reflect on the following questions.

- What surprised you?
- Where are you holding on too tightly?
- What would feel like a relief to hand off?
- What's one small experiment you could try this week?

Closing reminders:

Delegation isn't about giving up control. It's about choosing what to hold—and what to hand off.

If you'd like help turning these insights into action, we're here. You can book a quick call right [here](#) to explore what support could look like—no pressure, just a conversation.