

**#175: LIVE from Clio Con:
Top Delegation Tips from Successful Attendees**



Full Episode Transcript

With Your Host

Melissa Shanahan

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I'm Melissa Shanahan, and this is *The Law Firm Owner Podcast*, Episode #175.

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Melissa Shanahan: Hi, everyone, welcome to this week's episode. I'm so glad you're listening to this. If you notice noise in the background, this is because I'm sitting on the floor outside of registration with some great people at Clio Con. And, we are going to talk to you today about delegation.

You know, the whole reason people have some freedom to be here, is because they delegate. And those sitting around me, have experience with delegation and have learned some lessons over time, over the years. So, I'm going to have them share with you something that's lent itself to success.

And then also, something that they've learned maybe the hard way. Hopefully, there's at least one nugget in here that resonates with you, and you can take back with you into your firm and use it, in terms of delegation.

I want to say, before we pass the mic around, being in an event like this is meaningful. The sessions are great, but just being away and letting your brain focus on things that it should be focusing on, is important. I'm saying this because we are, for Mastery Group members, we are putting together an event in February, the 22nd to the 25th.

It'll be workshop style for the first few days. So, day one is going to be focused on accountability charts, and helping people put those together. My team is going to be there, and based on whatever it comes up with, we

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

are going to be able to hand you a copy of your accountability chart; in the way that we design it really beautifully.

Accountability charts help with all kinds of things; role clarification, transferring responsibility to people in the firm, and helping you see where holes are and what needs to happen, etc. I mean, there's so, so, so many good things about an accountability chart. I have done episodes on it before. And it's been a request of people, that I help more deeply in Mastery Group, so we are going to do it.

The second day of the workshop is going to be based around metrics and helping people create a dashboard for themselves whether they use a spreadsheet or Airtable® or something else. But a place to go where data, that they care about, gets tracked.

They're going to set a schedule for themselves to review it. They're gonna set a schedule, in terms of when they get reports on certain things. And basically, be set up so when they walk away, they don't have to do extra work when they go back to their firm. So, it's all about checking and metrics on day two.

Day three is an implementation day. So, our team will be there. We're going to help you make sure that you don't have anything left on your plate, when it comes to accountability charts or metrics that you can implement. We want you to walk away with all of it done.

And then, day four, will be a mastermind with Mastery Group members. They'll, you know, be there to have a mastermind-style day. So, this workshop is gonna be pretty freakin epic, but you have to be a Mastery Group member to attend.

If you've been thinking about joining Mastery Group, if you've been thinking about working with me, this is the time. This is the last time enrollment will be open before this workshop. So, this is the time to get in. Enrollment

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

opens the end of October, and will be open for one week. Get on the wait-list, so you're the first to know. There are more of you on this wait-list than there are spots. Get on the wait-list, so that you are first to know and you can get your spot.

All right, everybody. This is something new and kind of crazy. I am currently sitting on the floor, near registration, at Clio Con, with a few of my favorite people. We were talking about delegation and the topic of delegation. So, we thought we would share some of this on the podcast, and some tips, and nuggets, and success, around what people have found to be useful for delegation and delegating well.

I have Joey Vitale sitting next to me. Christopher White sitting next to me. I have Liz sitting next to me. Liz, I'm so sorry, I didn't ask your last name before, Henson, Liz Henson. Reyna Fisher, Jaime John Adams, and Roya Vasseghi.

So, I'm going to pass the mic to hear what everybody has to say. And the first question we're going to ask is what is one thing that you would say, that is really important to remember when you are delegating, that sets that other person up for success? Which ultimately means, sets you up for success. Let's start with Joey. You want to go first?

Joey Vitale: Hey everyone, my name is Joey Vitale. I'm a trademark attorney. We also run a service called Global Vetted VAs™. So, the trademark law firm is actually a team of 28, right now. Over half of them are overseas VAs. So, we do a lot of delegation. And now, we're helping other people better delegate and better hire, overseas.

What we often recommend, to the customers that we're matching with our vetted VAs, is that they hire two at once, and then, that they start assigning projects to both of them at the same time. So, that they're both receiving the project, they can work on it together. Usually, it's really helpful and appreciated to them, so that they can more easily work together, lean on

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

each other, and ask each other those questions, before they go to the business owner.

Chris White: So, this is Chris White. I am the executive partner and owner of Equus Law Group. I have 30 people who work for me, 10 of which are attorneys. I used to be the guy who did everything. And then, in 2015, I started a journey towards delegating a ton of responsibilities out of the firm. That started with my operations team, then it moved into transitioning the legal practices themselves, out of my hands.

And so, my journey went from \$800,000 a year of practice, and running, and operations, and everything, to a much larger firm of triple and almost quadruple the size. Practicing only 3% of the year, with an operations team that runs everything. And the keys to fundamentally good delegation is, when you have somebody new and they don't understand the way you work; they don't understand your systems, they don't understand your expectations, they don't understand exactly what's going on.

You've got to find a way to have clear, consistent expression of your expectations in the most mundane areas as possible. You've got to create a way for them to take on the simplest things, and take them off your plate. And then, evaluate those; feedback, clear, empowering communication of what's going on. And the more you do that in the mundane, the more experience they will gain to do the unique.

The more times you can say, "Hey, this only happens once every two months. But this is now on your plate." And, you can trust them to do that. And so, you have to start small. And, you have to be willing to take your time to explain what's going on.

Melissa: All right, Liz.

Liz Henson: Hi, I'm Liz, and I help business owners create culture and environment. So, my answer; I'm going to say, think about the culture and

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

the environment that you're creating for your team as you start delegating. My number one tip is to make sure that you're not creating a fear of mistakes. So, how can you create an environment where they're allowed to be creative, to have autonomy, and to make mistakes and learn from them?

If you cultivate a fear-of-mistake environment, you're actually going to manifest more mistakes.

Melissa: Roya, do you want to go next?

Roya Vasseghi: Hi, everyone, I'm Roya Vasseghi. I am a co-founder of Vasseghi Budd, PLLC in Fairfax, Virginia. We're a business and employment law firm. My partner and I, and one other attorney, we have a total of five employees. So, I'm at the beginning. I'm also a Mastery Group member. I'm at the beginning of my delegation journey. I'm getting better every day.

So, two things. Well, I think you really have to set expectations with yourself before you start delegating. It's not going to be perfect; it's not going to be the way that you would do it, necessarily. But it's going to be so helpful in the long run. That's, at least, something that's been helpful for me.

And then also, just explaining to the people that you're working with, how you work. Because I'm crazy busy, just like everyone else. I'm not always the most responsive. I just try to give them... This sounds kind of negative, but just like, this is how I am. Here are, like, the good things about me. But here are the bad things about me. This is kind of how you work with me.

Like a user manual, so the people that you're working with aren't scared to approach you and ask you questions. Yeah. That'd be my best advice for delegation. I'm at the beginning of my journey.

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

Melissa: Thank you. That was great. Hi, Crista.

Crista Hermance: Sure, my name is Crista Hermance. My firm is Hermance Law. We're estate planning attorneys in California. We have 5 office locations, 14 staff; 5 of which are attorneys. So, for myself, I will make a list of all the things that I do. And then, I will figure out what do I not have to do? What can I take off of my plate, that I can give to somebody else?

And so, when I go through this list, it's, who can do it? So, it's identifying, not just that I don't have to do it, but who on my team is going to do it. When I was coming here to the conference, I went through a bunch of projects that I had. And in the top right of each corner, I wrote who is going to be in charge of this project. Because I knew it wasn't going to be me, but I just knew that I wanted it.

Two have them are not positions I actually have in my firm, yet. So, they're new hires that I need to have that... It just showed me, okay, I don't have anybody on my team that can handle this right now. I need to hire somebody to be able to do it.

And I do this with my team, too. I will have them make that list, because I want to make sure that they're doing things that are at their level. And, that their time is getting used efficiently. That way, if I can take stuff off of their plate to do other stuff, I can give them other things that I know that are a higher level for them to be able to handle.

So, it's, even for my team, delegating some of the tasks that they're doing to maybe, some of the legal assistants that we have, or hiring other staff to be able to handle it, so that their time is freed up.

Melissa: Thanks, Crista. Okay, we're moving to Jaime. I said Jaime John Adams, she just goes by Jaime Adams, I think. We call her Jaime John. So, Jaime is on my team. She's also Joey Vitale's team. I see you delegate, and I think you're really, really, really good at it.

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

Maybe share something that you use, that keeps you more successful. We're going to apologize in advance, she's losing her voice. None of our voices are great today, because we had a loud night last night. But, yeah.

Jaime Adams: So, when delegating, I typically like to start really small. If there's a bigger project, or just a bigger task in general, that you want somebody to work on, you start simple, you start small. Give them something lower level, and be incredibly detailed in that explanation.

We like to use loom® videos. In the loom videos, act as if, whoever you're delegating it to, knows nothing about that platform or about that task. So, as simple as how to log onto a software, how to find the settings to make adjustments. No piece of that process is too small to explain. Knowing that you can always build on that as they grow and take on more responsibilities.

As you're hand delivering that task, or you're delegating that responsibility, just be incredibly detailed in the delivery and in the assignment. That way, they know exactly the outcome that you want. And then, you can build off that, and give them more and more of the project.

Melissa: Okay, next. This is Reyna. You have experience, so maybe share your role, and something that's lent itself to success with delegation.

Reyna Fisher: So, I'm Reyna. I work with Joey Vitale, with Indie Law. And then also, Elise, at Elise Buie Family Law. I've worked with several employees, contractors/VAs, on delegating and delegating things off my plate, as well. And really, what I would say is just start somewhere.

A lot of people have fear around delegation, because they feel like the other person might not know like, maybe they won't do it right, or it's easier or quicker for me to do it myself. But really, if you think long term, it's not easier and quicker for you to do it yourself. It's actually going to just, one,

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

be a burden on you. And then, two, prevent you from scaling and doing things that you should be spending your time on.

So, really start somewhere, and use Crista's list tactic. Like, just write anything that you don't like doing down. And also, anything that you're not good at. If you notice yourself procrastinating something, or if you notice yourself making a lot of mistakes, and having to go back and redo, delegate those things, especially if they're repeatable, like Chris said.

Really, just address whatever fear is preventing you from delegating. Acknowledge that, and see what are the pros and cons to not delegating. And, what the pros and cons are of delegating. And you'll notice that the pros of delegating far outweigh the cons, because you could be doing so much more. And your team will be doing so much more, because you're empowering them, as well, and showing them that you trust them.

Melissa: Thank you. Reyna mentioned something earlier about just get started, which you kind of mentioned here. But we were talking about how dialed you got Joey Vitale's firm, with processes and systems. And there's a level of... I'm sure you don't see it this way, but from the outside looking in, there's a level of perfection there, that people think they have to do right out of the box.

And, they don't. And so, just starting with the loom video, you can always make it better. You can write out the process later, but just doing it. And then, progress not perfection, basically.

Okay, so I would love to hear, what is one mistake or something that you didn't do well and you figured it out, and now you do it differently, when it came to delegating?

Jaime: So, in the beginning, when I was delegating a specific task, I would leave the outcome or the deliverable very open-ended. So, I was often

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

getting something, you know, delivered to me, that wasn't what I wanted. It just wasn't what I wanted.

So, being very specific, in what I want the desired outcome to be, it just made the delegation more effective. And, it allowed the project to move forward quicker. And, just keep moving it forward, I guess.

Just being very specific, instead of saying like, "I want you to research this." Why? Like, why do you want them to research a specific, you know, product, or you know, SOP (Standard Operating Procedure)? What do I want from that?

And when I'm not as specific in what I want, it sits there, it doesn't move forward. Yeah, deadlines. So, definitely letting whoever you're delegating it to know when you expect it back.

Liz: Hi, this is Liz. Hi. I'm gonna build off that for just a second, because I love to use that term "desired outcomes". And I think, one situation where I was actually being delegated to, and it was really difficult, was because they were focusing on the path, right? And I think, to foster creativity, to foster an environment that has no fear mistakes, focus on the desired outcome and let them create their own path.

Like, that's how people are creative. And as long as they're reaching the desired outcome, Jaime's path can look different than my path, and can look different than Reyna's path. And then, everybody can thrive in their own unique organizational structure.

So, I was inspired by what Jaime said, which led me to say that, and I know Reyna's going to add on to it.

Reyna: This is Reyna. Yeah, I'd say all of that was really, really helpful and incredible, too. What I was going to add was, to state the purpose behind whatever you're delegating. So, that you get buy-in by the person. Because

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

if they feel like it's a meaningless task, that you're just giving them, they'll do it. But it's more likely lead to burnout or not giving their best effort, because they're just kind of going through the list, like going through the process.

But if you say the purpose behind it, they understand the tasks a little bit better. They know how they're contributing to the firm, or the business, or whatever they're doing. And they're more likely to give it their best efforts, find better ways to do it, and ask questions on it, make sure that they're doing it very well.

Crista: Hi, this is Crista. So, I think there's also a sense of ownership for any tasks that you're delegating. And I think you need to make it very apparent when you are delegating these tasks, that they then understand that they are owning it. Because then, I feel like it's more of a sense of accomplishment for them, that they are doing this something. It's not just oh, they're helping with it. No, you are responsible for the outcome.

And setting the deadlines and having very clear expectations on what you want the outcome to be, is so important. Because otherwise, you have this idea in your head. And if you're not communicating it, when they don't deliver what you expected, if you didn't tell them, then how are they supposed to know?

And so, having this very clear and concise; this is what I expect. I like the creativity that was just mentioned. But what I found, is when I give that deliverable, of here's what I want in the end, they don't get there. And so, then I have to jump in and say, "Okay, let's try this, to try and help you get there. And you still have some creativity, but at least, it just kind of gets you going."

Because maybe they're just not at that level, where they can do it and use that creative side to get to where they need to go. They are, but it's not coming together. And so, I think it's the level, and what tasks they have.

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

And you know, maybe you're giving somebody a project that is really out of their comfort zone, and they're just kind of all over the place.

And so, really having that direction for them, and being very clear on what you expect. Because that is where I find that I am disappointed in results, is when I do not tell them what I expect them to do.

Melissa: Chris White.

Chris: I think what I made the mistake of not remembering, is that lawyers don't think like normal people. And they stop making us think like normal people through the course of law school. So, we've got to remember that when we communicate, we are not starting from the same space that many of our support teams, and our people we want to delegate to, are.

We've got to take the time to unpack our thoughts. If it can't be broken down into an action step, then it hasn't been broken down far enough. So, we have to be willing to break down these large, whole concepts that we've been taught, and summarize into their component parts, so that our team can deliver on it.

Melissa: Okay, that's great. And it made me think about, we focus on Project Deconstruction, with Rocks. If it's not broken down into action steps, it's not broken down far enough. I mean, that just sets you up for success, whether you're the attorney working on something, or whether you're handing it to an assistant.

Roya: What everyone said was amazing, I would just add as a, I feel like everybody in this group is a delegation pro. And I'm, again, at the beginning of my journey, but for the beginners out there, don't just do it yourself when you get it back wrong. Like, give it back. Give it back and explain what you want.

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

And I'm talking to myself right now. Let them do it again and be patient. You know, take the fear out of it; for you to trust the process. Like, they'll eventually get it. Because I have a tendency to just take it back and say, "Okay, well, I'll just fix it," without giving the feedback. And that doesn't help anyone. I'm frustrated, and the person doesn't have confidence in what they're doing. And, it's just not good.

Melissa: Roya doesn't give herself enough credit. She's like, "I'm new. Everybody here is an expert." But you've come a long way this year. And even though... So, you had an associate. That associate, you stopped working with. I mean, there was lessons learned there, about delegation and the person on the other end, and how to better do it from your angle, and what to expect out of it.

I mean, I don't know, I feel like you have some lessons learned under your belt this year, even though you feel like you're still learning. We're all still learning. You said delegation is a journey, it's not a destination. That is, if there's one takeaway, I hope that it's that, for everybody. Just make progress. It's not about perfection. You will learn along the way, and keep iterating on your ways, and you'll have lessons learned, etc.

One reason that, I think this came up while we are at Clio Con, is that a lot of people can be here because they have delegated, and they're able to be here. And that's certainly not true for everyone. But you have the freedom to give attention to things, that you want to give attention to things. And nobody else can give attention to, if you delegate.

So, now. Thanks everybody for hanging with me for a bit today. I really appreciate it.

Hey, you may not know this, but there's a free guide for a process I teach called, Monday Map/ Friday Wrap. If you go to velocitywork.com it's all yours. It's about how to plan your time and honor your plans. So that, week

#175: LIVE from Clio Con: Top Delegation Tips from Successful Attendees

over week, more work that moves the needle is getting done in less time. Go to velocitywork.com to get your free copy.

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