

Worksheet 03 — From bottleneck to second brain

From Chapter 5 — Scaling solo. Trust compounds monthly — start narrower than feels impressive.

. . .

Set up the visibility — before the first task is ever delegated

- ☐ Pick ONE shared platform where tasks, notes, and decisions live — route everything into it:

- ☐ Define starting access — calendar + tasks + drafting first; money and sensitive accounts come later, earned:

Starts with: _____ Earned later: _____

- ☐ Write your **Green list** — ten routine things they act on without ever asking:

1. _____ 2. _____ 3. _____ 4. _____ 5. _____

6. _____ 7. _____ 8. _____ 9. _____ 10. _____

- ☐ Write your **Red list** — the things you always see first (money, reputation, sensitive relationships, hard-to-reverse):

1. _____ 2. _____ 3. _____

4. _____ 5. _____

- ☐ Post the flag rule where you'll both see it daily: **an imperfect early flag beats a polished late surprise.**

Delegate for real — week one

- ☐ List every task you personally did last week that happened entirely via email or a screen:

-
- ☐ Hand **three Green items** over completely this week — including the authority to finish them:

1. _____ 2. _____ 3. _____

- ☐ Write the working agreement down and share it (*steal the one in appendix/working-agreement.md*).
- ☐ Set the daily-brief format: what moved · what needs you · what's blocked — bullets, not reports.
- ☐ Resist re-doing their work. **Correct the system, not the task.**

Grow the trust — every month after

- ☐ Protect the weekly check-in — honor their permission to re-book it when you cancel.
- ☐ Move at least one **Yellow** → **Green** each month. This month's:

- ☐ Hold the monthly role conversation (energy, clarity, sustainability, tools — not just tasks).
- ☐ Put the scope-and-compensation review on the calendar so it happens by design: _____ / _____ / _____
- ☐ Ask what would help them succeed — access, tools, training, context — *before* it becomes a problem.

. . .

Monthly check — is the Green zone visibly wider than last month? ☐ Yes ☐ No — why?
