

APPRENTICE



7 TOOLS

**FOR BETTER DELEGATION &
MANAGEMENT**

Dave Kerpen & Rob Berk

APPRENTICE

EXECUTIVE SUMMARY

We are so excited to share the top strategies and practical tips we've learned to help you streamline delegation and better manage your team! If you're part of the Apprentice family, we're so excited for your success and are always available for support along the way.

If you aren't and want to learn more please fill out **this form**. While we know that everyone has their own style when it comes to delegating and managing, we've compiled these tips from our experience working with hundreds of clients and Apprentices. These tips will not only help make your life easier and more efficient, but also help ensure that you're accomplishing your goals.

Caveat: We'll use the word "Apprentice" here for obvious reasons, but these tools and strategies are applicable in any business management relationship!



Dave Kerpen & Rob Berk
Co-Founders of Apprentice

TOPICS COVERED

1	COMMUNICATE EFFECTIVELY	03
	<ul style="list-style-type: none">◆ Communicate When Setting Deadlines◆ Keep Track of To Dos◆ Set The Agenda◆ Send Recaps After Meetings	
2	INTERGRATE YOUR APPRENTICE	08
	<ul style="list-style-type: none">◆ Discuss Which Platforms You Prefer◆ Calendar Access & Scheduling◆ Assign A Range Of Tasks	
3	SHARE RESOURCES	10
4	SHARE GOALS AND GIVE CONTEXT	11
5	GIVE GOOD FEEDBACK	12
6	USE TOOLS WELL	13
7	ADDITIONAL RESOURCES	14

1 | COMMUNICATE EFFECTIVELY

- ◆ Schedule two 15 to 30-minute meetings per week

a. via Video Conference (Zoom) if possible

- ◆ The first should be on Monday or Tuesday to establish the plan, projects, and goals for the week
- ◆ The second should be Thursday or Friday to review the progress and completed work

a. Check in early in the day to go over tasks and projects.

b. Ask if your Apprentice has any questions.

c. Give feedback on their work so far.

d. At the end of the meeting have your Apprentice send an update with their progress.

Experience Share: Regular communication, especially during the early stages of working together, is helpful in developing a strong working relationship. We have found that having two 30- minute meetings per week is the best way to ensure that there is always momentum and progress on projects. When in doubt, it's always best to over-communicate.

A FEW OF OUR AMAZING APPRENTICES





COMMUNICATE WHEN SETTING DEADLINES

- ◆ After assigning a task (if there isn't already a specific deadline), ask your Apprentice when they will complete it. If that timeframe works, great! If not, give that feedback and be clear when you need it by.
- ◆ Give as clear expectations about the task or project as possible a. What format should it be? (I.E. word doc vs presentation) b. Roughly how long should it be? (I.E. one paragraph vs. one page vs. five pages)

Experience Share: Regular communication, especially during the early stages of working together, is helpful in developing a strong working relationship. We have found that having two 30- minute meetings per week is the best way to ensure that there is always momentum and progress on projects. When in doubt, it's always best to over-communicate.

ROB MEETING HIS FIRST APPRENTICE ON ZOOM!

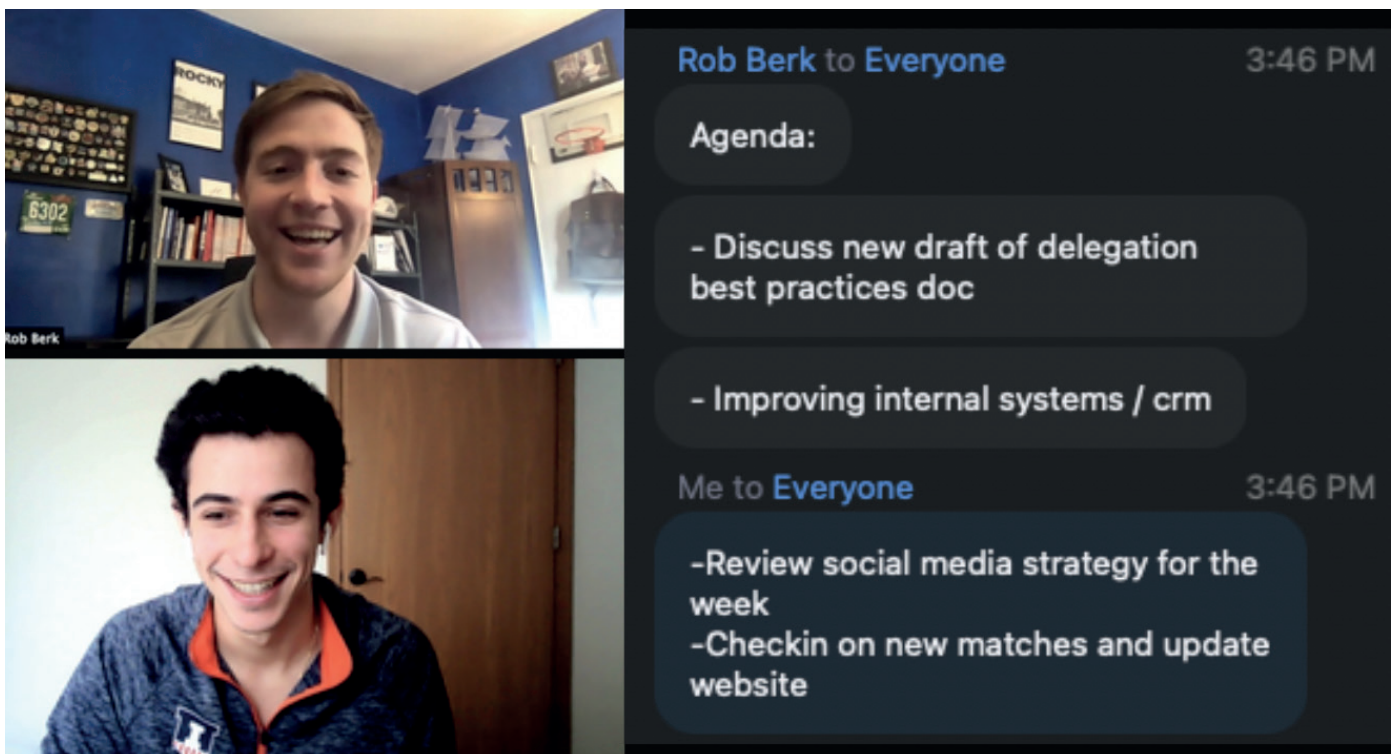


KEEP TRACK OF TO DOS

- ◆ Track and consolidate all notes and todos in one place. Use Slack, Google Docs, or other software solutions that work best for you. More resources on software solutions available on page 13.
- ◆ Rank priorities by most to least urgent.

SET THE AGENDA

- ◆ Setting a clear agenda ensures that meetings are as efficient as possible.
- ◆ When setting the agenda its important to think about what the action steps will be.
- ◆ Ideally send a quick email with a bulleted agenda before the meeting.
- ◆ If not, start the meeting by putting your talking points in the Zoom chat.



The image shows a Zoom meeting interface. On the left, there are two video thumbnails of participants: Rob Berk (top) and another man (bottom). On the right, the chat window is open, displaying a message from Rob Berk to Everyone at 3:46 PM. The message contains an agenda with two items: 'Discuss new draft of delegation best practices doc' and 'Improving internal systems / crm'. Below that, a message from 'Me' to Everyone at 3:46 PM contains two items: 'Review social media strategy for the week' and 'Checkin on new matches and update website'.

Rob Berk to Everyone 3:46 PM

Agenda:

- Discuss new draft of delegation best practices doc
- Improving internal systems / crm

Me to Everyone 3:46 PM

- Review social media strategy for the week
- Checkin on new matches and update website

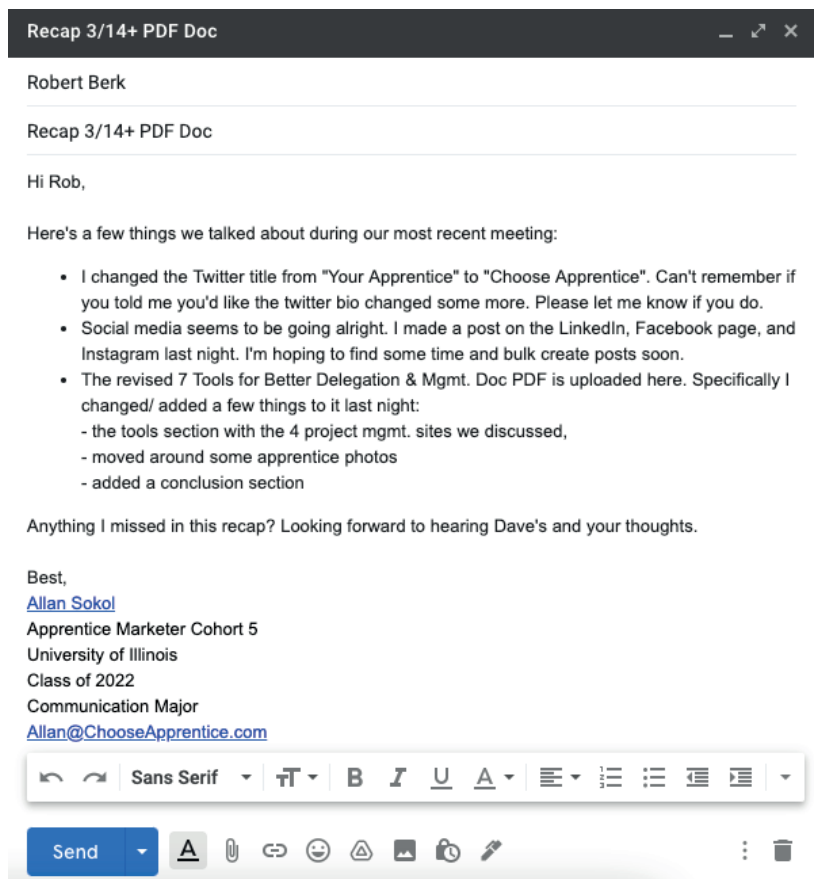
SEND RECAPS AFTER MEETINGS

- ◆ Meeting recaps help confirm that everyone is on the same page.
- ◆ Detailed notes during meetings.
- ◆ Recaps should include:

- a. A summary of what was discussed.
- b. What the next steps are and who is responsible for completing them.
- c. What the next deadlines are and what will be completed by then.



ALLAN, ROB'S NEWEST APPRENTICE, DRAFTS A RECAP EMAIL AFTER EVERY ZOOM MEETING



Experience Share: When I started as Dave's Apprentice, I would send recaps via Google Doc. I thought it was better because he could edit it and we could update it as needed. Dave explained that via email was better so he could read it faster and be more efficient.



2 | INTEGRATE YOUR APPRENTICE

- ◆ Treat your Apprentice as a regular member of your team.
- ◆ Give them a company email address, this is especially important for external communication.
- ◆ Invite them to team calls and regular standing meetings.
- ◆ Add them to your Slack and other platforms.
- ◆ The more people they know, the more help they will be able to provide.

DISCUSS WHICH PLATFORMS YOU PREFER

- ◆ What is your preferred method for regular communication?
- ◆ What is your preferred method for quick questions and faster responses?

- a. How formal or informal is your internal communication?
- b. Do you prefer to text, use WhatsApp, or Slack?

- ◆ How do you prefer meeting notes to be shared?

- a. Do you prefer a Google Doc, Emails, or Slack



CALENDAR ACCESS & SCHEDULING

- ◆ Give your Apprentice access to view your calendar (and/or schedule time via a link such as Calendly). A virtual open-door policy can help your Apprentice feel valued as a team member.
- ◆ Your Apprentice should put their class (and other mandatory activities) on their Google Calendar, so you will be aware of when they are in class. (and can't be as responsive as usual)

ASSIGN A RANGE OF TASKS

- ◆ Some tasks are urgent and need to be done consistently and regularly.
- ◆ Some that are evergreen or "anytime" tasks to do when either you're away or they're less busy. (i.e. blog writing, content creation, research, special projects)
- ◆ An early assignment that demonstrates core values and principles.

Experience Share: The first assignment I had my Apprentice do was to review our website. I asked him to be critical and to highlight areas that we could improve. I wanted to demonstrate that I am looking for my Apprentice to voice their opinion and to be critical so that we can continue to improve everything we're doing. I also listened to their feedback, to show that his suggestions and input are valued.

3 | SHARE RESOURCES

- ◆ Share books, podcasts, and articles that helped to shape you and that you find most valuable.
- ◆ Keep in mind that your Apprentice wants to gain more experience and learn more skills. Share industry news or any other resources that may benefit them.
- ◆ Have your Apprentice sit in on meetings that may not have to do with their specific tasks. For example, you can have them come to a sales call or a team meeting they usually wouldn't get the chance to see. Involve them in your work a little more and they'll appreciate it.
- ◆ This will give your Apprentice a better understanding of your business or the overall industry.
- ◆ Include some optional resources that promote personal and professional development



An Apprentice Lunch & Learn

4 | SHARE GOALS AND GIVE CONTEXT

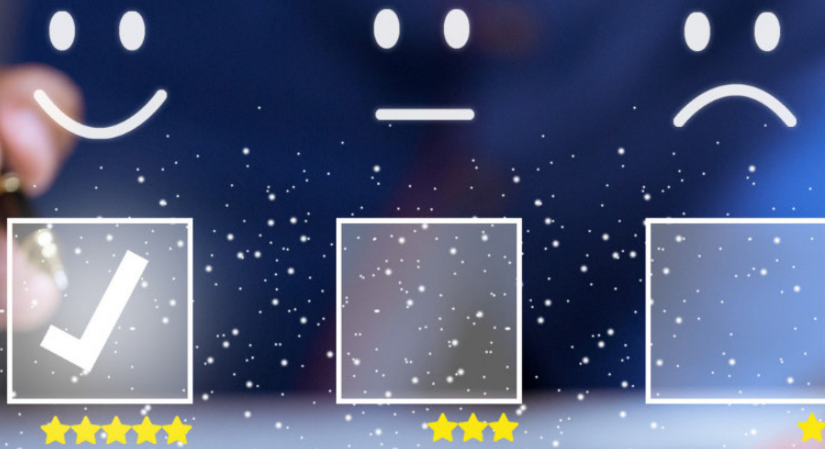
- ◆ Explain what your personal and professional goals are and how your Apprenticeship will help you reach them.

a. By discussing the big picture, the importance of each of the small steps to get there becomes clear.

- ◆ Ask your Apprentice what their goals are and if possible, allow them to pursue projects that align with their interests and growth opportunities.



Experience Share: My first major task was handling Dave's schedule, and he gave me full access and responsibility. He explained this would help me understand the range of projects that I would get involved with as we kept working together. He also made it clear that keeping his schedule organized was my responsibility, so I took ownership of it and understood the reason behind the task.



5 | GIVE GOOD FEEDBACK

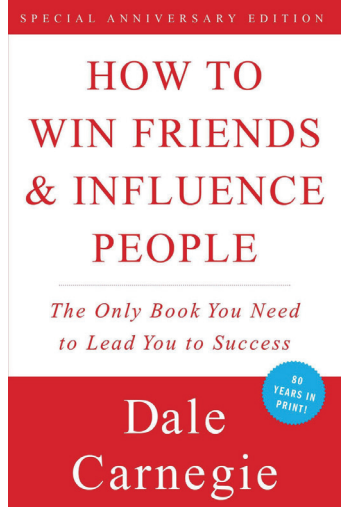
- ◆ Give them direct feedback after tasks to help them quickly improve
- ◆ When reviewing work:

- Explain why you're making the changes and/or edits. (avoid just making the edits)
- Celebrate successes and jobs well done!

- ◆ When giving feedback - focus on how they can (and will) improve going forward.
- ◆ Encourage your Apprentice to ask questions.

- Give a positive reaction to show support for that behavior

- ◆ Offer up a "praise sandwich" (Dale Carnegie, *How to Win Friends and Influence People*) start with something you like about the person and/ or the job he's doing, continue with the negative feedback, and close by affirming how much you value the person and how confident you are in him.



6 | USE TOOLS WELL

These are a few of the most common project management tools. We put together this comparison to help you choose among the four.

Check out [this link](#) for additional information.

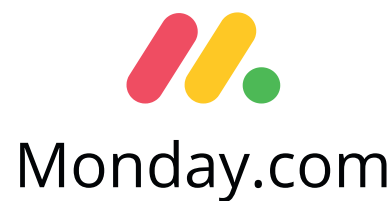
Pros	Cons
High customization Feature packed	Tough learning curve Time consuming
Free to use Little to no learning curve	Lacks advanced features like following tasks
Built in time tracking Useful visualization features	Goals are hard to track Expensive pricing
Easy to get started Beautiful interface	Tough to master Notification heavy



VS



VS



VS



7 | ADDITIONAL RESOURCES

- ◆ To Be a Great Leader, You Have to Learn How to Delegate Well
- ◆ Successful Delegation - Team Management Training
- ◆ 4 delegation best practices
- ◆ Delegation Management Best Practices
- ◆ How to Start Delegating Tasks Effectively (Step-by-Step Guide)
- ◆ 8 Best Practices in Business Management
- ◆ 7 Management Practices That Can Improve Employee Productivity

Want more advice or resources?

Simply Email

Info@ChooseApprentice.com



APPRENTICE

CONCLUSION

Some of the hardest skills to learn while growing and scaling a business is how to effectively manage your team and delegate projects! We hope that you've found our 7 practical tips insightful. It is so important to be proactive about your relationships with your team members so that they feel valued.

Delegation and management are skills that can always be improved and gets easier as time goes on. Best of luck growing your business while also making your life easier and more efficient! We're here cheering you on!

"A star wants to see himself rise to the top. A leader wants to see those around him rise to the top."

SIMON SINEK, AUTHOR AND CONSULTANT

IF YOU'RE INTERESTED IN HIRING YOUR OWN APPRENTICE
CLICK HERE