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How To Prevent Micromanaging

Shannon Waller: Are you guilty of being a micromanager? Or maybe even the opposite, you just do drive-by delegations? Stay tuned to learn an incredibly useful tool to get you out of any delegation don'ts.

Hi, Shannon Waller here and welcome to Team Success. Today, I want to give you some tools if you are tempted or are a micromanager. So let's talk about this. Or if you don't delegate because you're not confident on how to do that. Now, it's interesting, even people who have a lot of Who's in their world and are successful in delegating some things, I guarantee there's gonna be some area that you are holding back. So today will be super useful for you, because I'm gonna give you a tool. It's one that's available from Strategic Coach called The Impact Filter that actually will help you get your head out on paper. So, stay tuned for that.

However, I do want to talk about something first, and that is your mindset. So, if you are a micromanager, if you tend to be very task-focused, if you have Tenacity on Working Genius, if you're someone who has a lot of executing strengths, it can be really tough for you not to do those things yourself. And if you're switching from being a doer to being a leader or a manager, you can't do all of those things yourself. So how in Lord's name do you free yourself up? Or even if you're someone who is, as I said, capable and talented at delegating, except for certain things, then again, this will also be useful.

The mindset that I want to address is one of fear, essentially, that someone can't do it. I want you to think about all the reasons that would stop you. The person doesn't know what I want. I don't know what I want is the good one. I just know when it's wrong when someone else does it. I don't think anyone has the background to have the context that I have for certain types of activities for them to be done right. You know, there's just a lot of I don't know or I'm not confident in other people. There is a fear component to this. So I want you to recognize it and bring it to the surface. We'll tamp it down as it goes, but I want you to realize that you're afraid that someone can't or won't or isn't capable of doing it the same way or to the quality standard that you are doing it.

Even if you don't like this activity, even if you procrastinate like crazy, there's probably still some belief that I can do it better myself. You might hate doing the activity and you might postpone it until late at night and you're almost exhausted. It's like, oh, now I have to do this before I go to bed or whatever. But you still think for some reason you're the best person. So I just want you to recognize that a lot of micromanaging comes from fear that other people can't, won't, aren't capable of doing it to your degree of satisfaction. So just be aware. And I want to give you this tool because I think it will help provide an antidote to that. Again, you could be at the very beginning of your delegation journey or have you done it for years, but I guarantee you will still get some insights from this conversation.



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There is another group of people, actually, who are just like, please, gosh, anyone else other than me should be doing this. And they just like whip the activity or the task or the project in someone else's head and they run away. We call this a drive-by delegation. Yes, we've named it. So if you're a drive-by delegator that just tosses stuff at people and runs with no time for conversation or for clarity or, you know, them to ask questions, this is also for you because your form of delegation is the opposite. You don't have a death grip. Delegation death grip is another thing we've named. You don't have the delegation death grip, you have the delegation drive-by. Neither are helpful, and neither of them equip your team with the capabilities and the know-how and the confidence that they need to successfully take a task, to take a project off your plate. So please, please, please, stay tuned, because I think this is a really valuable conversation.

Before we dive into really going through how to think this through, I want you to think about why you are delegating. What is the value? If you don't have a big enough why, then you won't do it. And if you haven't watched it for a while, go back and watch Simon Sinek's TED Talk, "Starting With Why," because it's brilliant. And it's brilliant for your own use, and it's also brilliant when you're articulating what it is that you're delegating to somebody else. And again, be really clear on your why. And I want you to think about it this way, and I'm going to use some metaphors here. If you are hanging on to a trapeze and you are thinking that you need to let go, you have to be strongly motivated to want to get to the other one that's flying through the air. If there isn't one there or you don't care about it, you're going to have a very strong grip on that first one. You are not letting go.

So you have to have a big enough reason for you to let go of what you were previously doing in order to reach for something different, for something hopefully bigger and better. And it's going to be bigger and better for you, maybe not for somebody else. Please don't judge what you're delegating or what you're letting go of. So again, it's why are you letting go? Why is this important to you to let go of? If you're not clear on that, then it will be very challenging. You will just pay this lip service. You'll pretend to hand it over, but you'll never let go. You will be super critical of how someone else does it because you don't have a big enough reason.

And I get to see this all the time in Strategic Coach. So we start coaching people on our Entrepreneurial Time System of Free Days, Focus Days, and Buffer Days. People start to have to let go of things if they want to take Free Days and spend 24 hours midnight to midnight not doing any work. They need to do that if they want to be able to focus on their biggest and best opportunities, what we call their top 20 farm club, to go for their next largest check. Right? You have to let go of some of this to get some of that. And that is so important in this process. But if you're not clear on what your bigger future is, if you don't have a reason why, you're not gonna let go.



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So just, if you need to pause for a moment and think through, oh, what would make it worthwhile for me to let go of this, to stop doing this particular type of activity? What would have to be true? All of those questions you wanna ask yourself, because again, without that consciousness, you're just going to find yourself regressing. It's going to be a very unsatisfactory experience for you and your team or to whomever you're delegating. So again, be really, really clear.

And by the way, my goal is that you're really excited about that bigger future. It's like maybe you get to go and work with bigger and better clients. Maybe you're starting a podcast. Maybe you are writing a book. Maybe you are taking a big dream trip that you've never taken before. Maybe you've got some big, ambitious revenue goal where you need to focus all of your creativity and attention on your next biggest clients and your next big deliverable and your next creative endeavor that's gonna be worth a ton of money. You know, people are gonna pay you a ton of money for this because it's so incredibly valuable and transformative. But you need to be freed up from the stuff that you've been hanging on to if you're gonna be able to do that.

So first of all, create a bigger future for yourself. Just having had a recent conversation about what freedom looks like, it's like, what greater freedom do you want? Do you want greater freedom of time? Do you want greater freedom of money? Greater freedom of relationship? Greater freedom of purpose? When you get freed up from doing those things that drain you, that, I was gonna say, suck the life out of you, that wear you down, that make you frustrated, that just don't have you be your best self, mmm, that's not a fun spot to be in. So when you get rid of those things, all of a sudden you get these freedoms that I'm talking about, and actually more time to spend on your freedom of health and wellbeing, because that's the foundation of everything. If you're not healthy, those other freedoms really don't come into play.

So freedom to take care of yourself would be another one. When you're really, really clear on your why, and hopefully this will spark some ideas for you, then you're like, oh yeah, why am I hanging on to this activity? I'm sure I can find someone, a Who, who's better at it or has more time for it than I do. And this is interesting. I'm throwing in some Coach concepts here. But if you are moving from what we call excellent level activities into Unique Ability activities, let's be clear, you have superior skill at both. You are really, really good at certain things. And I think delegating excellent activities is the hardest because delegating something you're clearly bad at, your incompetent activities, it's not rocket science to get that off your plate. It's costing you money right now if you're still doing it.

Getting rid of something you're merely adequate or okay at, what we call competent, also not rocket science. But getting rid of something where you have a great reputation, where you get really, really good teamwork, where you usually get rewarded—people are like, oh my gosh, I love when you do blah, blah, blah, you know, thank you so much. They say nice things, they



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pay you, all of that. But internally, you're bored. That is a problem. We can get trapped. Julia and I and Catherine wrote in our first book, *Unique Ability*, about the excellent trap. I believe it's also in *Unique Ability 2.0 Discovery* as well.

Because we can get trapped at the level where we have superior skill, but we've lost our passion. Maybe it was unique at one point, but now we're like, been there, done that, got 15 million t-shirts. Next. Right? But again, we've been doing it for a long time. I just let go of an activity that I love, that is fun, that I got to meet really cool people, I got to coach, but I needed to let it go because from a time commitment, there was something that I could take on that was doing very similar activities, but that actually would generate more revenue. And then I needed to be freed up from this smaller benefit activity to go to a higher level one. And that's tough. Oh my gosh.

So letting go of excellent, letting go of smaller value, *Unique Ability* activities, that's hard, just saying. But if you're at that point, you know exactly what I'm talking about. It's like it's time to get really clear on your bigger and better future. You have to know what you are reaching for. And that is the only thing that makes it worthwhile of letting go of those other activities. So again, spend a minute getting really clear on what you're excited about, what will make it worthwhile changing some of the things that you've been doing for a long time.

So let's talk about how to do this. So again, this is to free you up from being a micromanager. Again, there has to be a good reason. If there's no good reason, you're going to default to your previous level of familiarity, let me call it that, in your habits. So here's the brilliant thing about *The Impact Filter*. And if you're not familiar with *The Impact Filter*, we've included a link in the notes. It's available if you go on to strategiccoach.com. If you're in the Program, it's one of your core tools. If you've just joined Strategic Coach, we give you access to that immediately, even before you start the Program. So it's a critical tool.

In fact, at one point, if you asked Dan, what are the three most important tools in Strategic Coach? He goes, number one is *Impact Filter*. Number two is *Impact Filter*. And you guessed it, number three is *The Impact Filter*. But I want to talk today how to use it as a delegation filter, which is actually how it started, which is very close to how it started. So there are several parts to *The Impact Filter*. So I'm just going to read them off or say them out loud, and then you can write them down. But also, please go and get the download because it's so incredibly useful.

So first of all, is to really identify what is the situation, okay? What is your focus for this? What is your purpose for this? What's the activity it is that you want to do? And let's just take customer service as an example. So customer service, and maybe it's a certain type of client. You can make this really specific for your industry or your profession, you know, what needs to happen. Then you want to do purpose, importance, and ideal outcome. And so you're actually describing the purpose of this activity. You are giving context around what it is. Again, you may



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or may not have used The Impact Filter in this particular way, but it works brilliantly. It's so effective. I've used it so many times. I'll share some examples with you at the end.

So now let's do a deep dive into The Impact Filter, or this version of it is really the delegation filter. So you're going to name the activity. What is it exactly that you are hoping to delegate? So the example I'm going to use is customer service. In our company, that's called our Program Advisors. So this is actually like a one-page job description. It's really cool. So what is the activity that you are hoping to delegate? Maybe it is booking your own flights. I know you, I can see you. Maybe that's something that you've been hanging on to, no matter how ridiculously successful you are, you have ownership over that because you don't trust that anyone can do it as well as you can. Possibly true, but I guarantee someone else could probably help you figure out some of the best options. And they will know where you want to sit in the plane, how much legroom you want, what type of flights you want to take, what airlines you like, all the things. There are people out there who can figure that stuff out and do it masterfully.

So it could be something as complicated as booking flights or as big as customer service. Okay, so you can choose. Then you want to do purpose, importance, and ideal outcome. Purpose is what are we talking about? Taking care of our clients. This is the what—connecting with them once a quarter minimum and more actually in the first year. It is making sure that our clients connect with the Program and really personally connect with the tools and concepts that they are applying the Program to their own businesses. There's nothing worse than going into something and then just it's general, but you're specific, and those two things are never coming together.

Our Program Advisors, you know, the purpose for them is to help connect the Program with someone's own personal entrepreneurial experience to help them accomplish their goals. That is the purpose of what they do. What is the importance? This is the why. I was talking about this earlier with why you would let something go to delegate. This is why this role is important. Well, if we don't do this, this is how I like to answer the question, then people don't fully connect with the Program. So the importance is that people really connect, that they actually stay in the Program, that they feel like the Program is personal for them, that they are taking advantage of all of the resources like the Weekly Planning Call and the monthly power-ups and the focusing calls with their Program Advisor.

So the why is so that our program works and that people don't just get the benefit in the first year, but get, you know, we really find mid-year too is when that's the knee of the curve. That's where it goes from incremental growth to like exponential. And then we want them, people to stay in for three years at least so that they get that incredible upswing when you stack all of the new concepts, new tools, new habits, new ways of doing things, more freedom of time, money, relationship, and purpose, oh my gosh, people's lives get so much better, so much faster. So



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the progress is really rapid, and then they can decide what their next thing is, if it's 10x, Free Zone, all the things, but that's the why.

And then there's the ideal outcome. This is where you get to get really specific about what the job looks like. So for Program Advisors, it's talking to our clients for focusing calls in the first year twice, and then for other years, depending on how much care and attention, and feeding our clients require as needed to make sure they're connected with the resources, they're on Coach Connect, they're connecting with the community, organizing, you know, people are connecting for dinner the night before, helping to facilitate that, making sure people get what they need in the workshops, making sure that they're able to answer questions, all of those things.

So this is kind of what the ideal outcome of that role looks like. That's the picture you are painting for the ideal outcome. And we don't use the word ideal a ton. It can lead to the Gap, but here's where you get to pour down what is it you really want. Now, the next section is really so incredibly useful for delegation. This is where you tell a best story about when someone, you or somebody else, has done this job extraordinarily well. And then the worst is this is where you tell your horror stories. If it was in the army, this is when someone dropped the grenade. I don't know, something blew up. Hopefully no one. Mistakes were made, quote unquote.

So you really want to tell some really powerful stories. And if you think about it, this is actually how the army trains so many of their people. They tell success stories and they tell cautionary tales in terms of the worst result. Worst result, no connection with the client. They feel lost and confused. They're super frustrated with the Program. Maybe they're at the wrong level. Maybe they need to bump up a level. Maybe they are, for whatever reason, not taken care of. Maybe there's something that happened in their life that you're not picking up on that would actually really impact, if we were able to look at them and take care of them, they would have a transformative experience.

Worst experience also is that someone doesn't renew, you know, that would be another one. They don't get the full benefit of the Program and all of the changes that they're putting in place. So you articulate the worst result. Worst result for the booking flight example, that's easy. Wrong flight, wrong time, wrong day, crappy seat, and the very back row near the washrooms where the seat doesn't recline. You can paint your worst-case scenario. This would be fun. Missed out on points. Whatever is important to you, you get to write all of those down in your worst result.

And this should be a little bit emotional. Best- and worst-case scenarios or stories, you know, the best one should get you like, oh my gosh, we transformed this person's life. Worst case scenario is like, oh my gosh. We had no business doing that, right? So you want to tell those stories. And this is where you get to emulate the very best person who's ever done it. And then



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the worst, you're like, oh, either this person is no longer doing that role, maybe you fired yourself, I don't know. But you get to tell the worst-case scenario. It's very terrifying and entertaining at the same time.

But just imagine, one of the things about job descriptions that drives me crazy is they don't tell a story. Talking to a good friend last night, she's talking about the difference between people and computers. She goes, with people, she goes, I can remember a story about a someone, and she's a medical practitioner. She goes, I have so much context for stories, but with digital, there's no story. Like, how do you fix this thing? Click here, do this, do that. She goes, there's no story. So it's really hard to remember, which I'm like, that is a really good way to articulate that.

So telling the stories is so incredibly useful, but we don't do that in regular job descriptions. Here's when the job was done extraordinarily well. Here's the best example of a Program Advisor or someone who did a great job booking my flights. Here was the best trip I ever booked for myself. You can tell that story if that's you. And then the worst-case scenario, it's like, Well, this was not the person who booked this person's flight, but one of our old clients, he's like, yeah, I showed up at 7 p.m. for my flight only to discover once I got to the airport that the flight had been at 7 a.m. same day. So yeah, and I have so much travel trauma. That would be a very long podcast if I were to share my, I'm like the worst at travel booking, and I could fill up 18 different worst-case stories of that. So I should never do my own travel, clearly. So just to give you that context.

So the best and worst is really powerful because when you get to the success criteria, of which there are eight in the full version, that's when you want to ensure the best and prevent the worst. So this is where you get to write out your success criteria. What needs to be true? And let me tell you, you know this. So here's why I love The Impact Filter for delegation is because you get to see your brain on paper. And you're like, oh, I didn't realize that this was a success criteria. And this is important to me. And these are my standards.

Raise your hand if you have standards. I do. In fact, I've got really high standards. If things are important to me, I want done really, really well. Now, things that need to happen that I have no expertise in, I trust other people's standards. But if someone is taking something off my plate or like doing my scheduling or any of those other things, oh my gosh, I have standards. But here's where you get to really write them down and delineate them. And this almost becomes a checklist.

Brilliant book called *The Checklist Manifesto* by Atul Gawande. And it's not a new book, but oh my gosh, I was so sold on checklists. And then I get to see them everywhere. Our Unique Method tool is a checklist. Impact Filter is certainly a checklist. The new success strategies and our Experience Transformer tool is also a checklist. And if you're a checklist person, you're



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going to go to town on this. If you're not, you're going to discover this whole new capability, which is really fun.

By the way, you can also score it out of five. My minimum standard is that someone hits a four out of five. That's my standard for myself. I want at least 80%, not terribly interested in 60 or 65 or 70. It needs to be 80% or better. Now, if someone hits a solid 80, I'm good. If someone does something 80% as well as I did, I'm good. You can have this. I am moving off to my next thing that I'm figuring out. But if someone can't do it to that degree, I'm going to work a little harder either with you or to try and find someone who can. So again, you get to have standards with this. This is what is so important.

So here's some fun ones I've done. A number of people have complimented me on how I interviewed Dan and I'm such a good interviewer. And I was like, really? I don't know what I'm doing. And then one day I wrote out an Impact Filter on how to be a great interviewer, especially for podcasts. And it turned out that I have a purpose, importance, and ideal outcome. I have best case examples, I've got worst case examples, and I have eight success criteria for how I do it, including being enthusiastic, asking great questions, summarizing. There are eight, right? And I've actually named them all. It's like, ooh, I do have standards, which is really fun.

And I'm actively interested in conversational tools. I've been having so much fun doing a deeper dive into Black Swan training. We're having training very shortly at the company, which is great. I just read a brilliant book called Ego, Authority, Failure by Derek Gaunt, who also works with Black Swan Group about how to put everything together. And, you know, seems like, sounds like, looks like, feels like is a great way to elicit information. So is mirroring, repeating the last three words of what someone said, dynamic silence. Like I pick up these tools like they're little pieces of gold lying on the ground because I'm interested and invested in great conversations, which is really what interviewing is, if you think about it.

But that's on my list of things, right? So what do I do? It's like, oh, I didn't know what I was doing until I wrote it down. I knew I did it. I knew it was fun, but I couldn't delineate it until I actually filled out an Impact Filter. And it's like, oh, pretty darn good Impact Filter if you ask me. I also did one on writing and what my tone is. And by the way, this is a brilliant thing to feed into ChatGPT or Perplexity or your favorite AI. You have standards about how information is given back to you. And if you want to emulate your own voice, quote unquote, for a LinkedIn podcast, or for a white paper that you're doing, or for email to your team, you want it in your voice. You can actually train it on your voice. Super cool.

But again, how do you know what your voice is? Well, do an Impact Filter. You'll figure it out really fast. You could do this, again, customer service in your company. You know, how quickly the phone is answered, preferably before three rings. You know, you have standards for how people are greeted when they come into your company. You've got standards for onboarding.



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You've got standards for offboarding, I hope. You've got standards for the sales process. You've got standards for who your clientele are, for your prospects. We've all got standards. But often they're not articulated, and we sometimes fail to communicate what they are, but then we're mad and we punish people when they don't know what it is.

Well, this is a way on one page where you can communicate what your standards are, and then you can get to coach people on where they're totally hitting it, you know, nailing it, and where they're not hitting the mark and where they need some points of correction. So, so useful. Oh my gosh. And again, it's one page. Will not take you that long to figure it out.

So again, just to be clear, success strategies are your success criteria, I should say. This is how to ensure the best result, prevent the worst. You'll also pull in some of the specifics from your ideal outcome. But just imagine if you were to receive this, if you were to take on a task from someone and they've delineated what they're talking about, what is the purpose, what are they doing, importance, the why, ideal outcome, the best result when it's done and done extraordinarily well in kind of a story format, the worst when someone messed up big time, it was a disaster, lost the client, whatever, wrong plane, all the things, and then the success criteria that encapsulates, as I said, the ideal outcome and how to ensure the best and prevent the worst result.

You have just been given such a valuable piece of paper or digital download, however you're doing it, because they have clearly laid out how to win, how not to screw up. Oh my gosh, that's what every person wants. And I don't care if you've been there three months or 30 years, you know, if you're taking on something new, you want this information. This is a great thing to do, by the way, with a client, about what their success criteria are for working with you, and you get to articulate what yours are working with them. Clear communication, responding to emails, all of the things.

I actually use Impact Filters when I'm interviewing an author that I don't know particularly well. Actually, forget that. I use it with everyone that I interview. And I'll say, here are the success criteria. You know, here's the purpose, ideal outcome, result that we're after, best and worst, and what our success criteria are. And that means my interviews go really, really well because we are all literally on the same page. So fabulous for lots of ways of getting aligned and using it as a delegation tool to get things out of your head will prevent you or at least take a very solid step in the right direction so you don't have to micromanage.

Then what happens is because your brain is on paper—again, it could be digital, but work with me here. Because your brain is on paper, someone can check on that. They're like, okay, I've done 1, 2, 4, 5, you know, 7 and 8. I need some help in 3 and 6. You know, I'm not sure if I'm hitting the mark on these. You're like, congratulations on what's working. How can I help? Right? So, you don't have to micromanage because you can be really confident that they are referring to and using The Impact Filter. And if they're not, that's another conversation.



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So, do you see how this can get you out of your head? How this can help you elevate yourself? Delegate and elevate is the term that EOS, Autopilot Operating System, uses. But we need a tool, we need a tool to get our wisdom, our experience, especially if we've been doing it forever, so that we can let go, the metaphor I use is the baton, like a relay race. If you don't let go of the baton, you got delegation, if you're either a drive-by or a death grip, you know, this is not functional. Your team will never be what it can be. You'll never be freed up, they'll never be freed up to do what they do best. And so The Impact Filter can really be the tool that can help you do that.

All right, hopefully I have inspired you to go to want to fill one out in this context, from a delegation standpoint, not just an intentionality of what you want to have happen. But it is actually what you want to have happen with regard to delegation, someone else taking over something important, especially if you're the one that's been doing it. So anyway, just want to empower you to no longer be a micromanager or someone who whips a baton at someone's head and runs away. I want to give you a tool that helps be a really effective, graceful, useful handoff, and you can have a conversation, you feel confident, they feel confident, and you are off to the teamwork races. All right, thank you so much for listening. I hope this has been useful and maybe even inspiring. Any questions or comments, please let me know at questions@strategicoach.com. And as always, here's to your team's success.