



Shani's Office

**Your Small Business
eSpecialist!**



Delegation Guide

DELEGATION 1

ASSISTANT LEVEL OF
EXPERIENCE = 0



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Finally, use your head. Nothing in this publication is intended to replace common sense, legal, medical or other professional advice, and is meant to inform and entertain the reader.

We will briefly walk through the hiring process, then jump right into what you may consider delegating to someone with little - no experience. This will set them up with the experience needed to move to the next level of assisting you. I will share ideas, tips and some handy tools to help you simplify the delegation process. **Remember: the purpose of delegating is to create more productive activity (IPA) time for you - get you making more money!**

FINDING GOOD HELP
WHAT TO DELEGATE
FOLDER/PACKET ASSEMBLY
EVENT AND/OR PARTY PACKING
GUEST/DEBUT RSVP CALLS
MAIL PROCESSING/MAILERS
MANAGING PAPERWORK
CHECKING/SHELVING NEW PRODUCT
PACKING ORDERS
ADDITIONAL RESOURCES
NEXT STEP

FINDING GOOD HELP

When considering hiring an assistant, remember that you are looking for someone with little to no experience, so what you are really looking for is someone available, reliable, trustworthy, and would like some extra money.

Once the decision has been made that you are definitely hiring, begin to ask around among friends, family, Church, and Unit members. You might also consider posting a free classified add online with a local news resource.

Schedule a time for them to come to your home for an interview. You may print/cut out/use the form below or, you may [click here for an editable excel version](#).

If things go well, you might hire them on the spot - or you may schedule a time frame to let them know (*i.e. I will call you by tomorrow at noon - if it's a go*).

Name:	Phone:
Do you have any job experience?	
Are you ok with an income that varies? <i>As my business activity is what determines the time I would need your assistance</i>	
What days/times would you be available?	
Why would you be taking the position?	
Why would you be good for this position?	
If hired, when can you start?	
It's not necessary for this position - but do you have any computer skills?	
Is there anything you would like me to know about you? <i>hobbies, sports, family, etc...</i>	

WHAT TO DELEGATE

The following is a quick list of the types of tasks you are looking to delegate to someone with little - no experience, you may have several more things to add to the list, and some may not apply. You may print/cut out/use the form below or, you may [click here for an editable excel version](#).

<input type="checkbox"/> Assembling Recruiting Folders	<input type="checkbox"/> Assembling Welcome Packets
<input type="checkbox"/> Assembling Hostess Packets	<input type="checkbox"/> Assembling PMS Bags
<input type="checkbox"/> Assembling Facial in a Bag Packets	<input type="checkbox"/> Success Event Packing
<input type="checkbox"/> Gift Wrapping	<input type="checkbox"/> Party Set-up/Packing
<input type="checkbox"/> RSVP Calls (<i>Guests</i>)	<input type="checkbox"/> Mail Sorting
<input type="checkbox"/> Preparing Mailers (<i>postcards, etc..</i>)	<input type="checkbox"/> Managing Paperwork
<input type="checkbox"/> Checking/Shelving New Product	<input type="checkbox"/> Running Errands (<i>bank, store...</i>)
<input type="checkbox"/> Packing Orders	<input type="checkbox"/> Taking Messages
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

ASSEMBLY

You want to have all items needed on hand, as well as an assembled example of each thing you would like put together - along with a list in the order of the contents. I recommend stapling it to the actual sample (*i.e. folder cover*). Review the list and contents with them, as well as where to find the contents when needed. You may print/cut out/use the form below or, you may [click here for an editable excel version](#).

Sample Recruiting Folder Items

- Team Building Brochure
- Business Card
- Accolades/Quick I-story
- Agreement
- Starter Kit Flyer
- CD, DVD, or Dial in #

Sample Hostess Folder Items

- Look Books
- Hostess Brochure/Guest List
- Outside Order form

Sample Facial In a Bag

- 5 x 8 self-sealing bags
- Samplers
- Beauty Book
- Instructions
- Business Card

Sample Welcome Packet

- Ready, Set, Sell
- Inventory CD
- Unit Welcome Packet
- Business Card

Sample PMS Bag

- Pizza or Popcorn/Soda
- DVD
- Feedback Form
- Cute Bag/Pail

Project Name:
to keep on hand:
Contents as listed below:
Please let me know when when we have less than ____ of any of the contents needed for assembly - THANKS!

EVENT AND/OR PARTY PACKING

Have all items needed on hand, as well as the packed example. Review your list and contents with them, as well as where to find the contents when needed. I recommend re-packing after each event. You may print/cut out/use the form below, or you may [click here for an editable excel version](#). For those conducting Success Events, I recommend using a wheeled suitcase for your event supplies.

Sample Success Event Items

- Sign In Sheets (*guests/cons*)
- Tickets (*for drawings*)
- Agenda
- Accolades (*for intro*)
- Career Pins/Ribbons/Sashes
- Crowns/Tiaras
- Party List below

Sample Party Packing

- Pens
- Money Bag
- Gift (*for drawing*)
- Recruiting/Hostess Folders
- Feedback Forms
- Face Cases
- Headbands
- Cotton Balls
- Facial Cloths
- Color Cards
- Mascara Wands/Samplers
- Demo Product (*in roll-up*)
- Sales Slips
- Pre-Profile Cards
- Closing Sheet/Set Sheet
- Look Books
- Flip Chart
- Camera
- Date Book/Calendar
- Sales Product
- Shopping Bags

Event Name:
Contents/Quantity listed below:
Please let me know when when we have less than ____ of any of the contents needed for packing - THANKS!

GUEST/DEBUT RSVP CALLS

Having RSVP (*thank you*) reminder calls is a great way up the numbers at events/debuts. You want to find someone who has a nice phone voice, or demonstrate by doing the first few yourself. I have included a sample script for your assistant below. You want to be sure that they have the event details (*date/time*) just in case they are asked (*which sometimes does happen*). It is best to have the calls made from your phone the day of, or 1 day prior to the event/debut/party.

If contacted:

Hello, may I speak with _____ (**guest first name**)? Great, I'm glad I reached you in person. My name is _____ (**assistant first name**), I am calling from the office of _____ (**directors full name**) with Mary Kay. _____ (**consultant first name**) let us know you were planning to attend _____ (**event title**) tonight/tomorrow. I just wanted to give you a call thank you in advance for supporting her, and let you know we look forward to seeing you there! Have a great day.

Leaving a message:

Hello _____ (**guest first name**) My name is _____ (**assistant first name**), I am calling from the office of _____ (**directors full name**) with Mary Kay. _____ (**consultant first name**) let us know you were planning to attend _____ (**event title**) tonight/tomorrow. I just wanted to give you a call thank you in advance for supporting her, and let you know we look forward to seeing you there! Have a great day.

Print versions:

If contacted:

Hello, may I speak with _____? Great, I'm glad I reached you in person. My name is _____, I am calling from the office of _____ with Mary Kay. _____ let us know you were planning to attend _____ tonight/tomorrow. I just wanted to give you a call thank you in advance for supporting her, and let you know we look forward to seeing you there! Have a great day.

Leaving a message:

Hello _____. My name is _____, I am calling from the office of _____ with Mary Kay. _____ let us know you were planning to attend _____ tonight/tomorrow. I just wanted to give you a call thank you in advance for supporting her, and let you know we look forward to seeing you there! Have a great day.

MAIL PROCESSING

Sorting through incoming mail can be a great timesaver for you. Most incoming mail will fall into 1 of 3 categories: junk, bills, personal. Let your assistant know what you want done with each category (*i.e. Bills go in this slot, personal things go on my desk, etc...*)

Have them check with you if in doubt about something - or inform them of errors for future reference.

MAILERS

Postcards, birthday cards, thank you cards, newsletters, letters, etc... Anything you are processing in house can be labeled, stamped, and mailed by your assistant.

Be sure they have directions to your local postoffice, know the postage rates and have the postage needed.

You may print labels from InTouch for those who need items mailed to them, or if you do a lot of mailing in house, you might consider creating a label binder. Print 1 full sheet for each Unit Member, and hole punch it upside down to avoid punching out the name/address and keep them in alpha order in a binder. To maintain the binder, print a new sheet for each New Consultant and remove the ones no longer in the system.

If you are creating documents and having them printed, you will want to include your return address prior to printing. Have printed materials either delivered, or picked up by your assistant.

Newsletter mailing will need the mailing seals added, so be sure to pick those up in advance. Postage may be ordered online from the USPS.

For items needing your personal touch (*signing, encouragement, etc..*), do your part, add a sticky note who it goes to and let your assistant do the rest (*label, post, mail*).

MANAGING PAPERWORK

I love the phrase “file don’t pile”. Feeling unorganized and overwhelmed in your workspace does nothing positive for your business. Teach your assistant to file things like receipts, sales slips, feedback forms, etc..

Personally, I believe that the completed feedback forms should be kept with you, in your Director Success Binder. Keeping them with you, helps you take advantage of any down time. So long as you have a phone with you, you can follow-up.

A great way to file receipts/business expenses is in an file folder that has a slot for each month - just drop them in. Office supplies, wholesale orders, meals, etc...

It’s a good idea to have a customer file for your personal customers where you can keep a copy of their sales slip (*be sure to date them*), profile form, etc...

Once you’ve shown your assistant where everything goes, you just need a designated shelf or box to drop everything in that needs to be filed away. Try to stay away from stacking it on top of the cabinet, as some items may fall off or behind the cabinet and end up lost or discarded.

Another great idea is to file the contents needed for assembly, postcards, birthday cards, look books, feedback forms, closing sheets, and even your business cards... in a filing cabinet. When orders arrive or items are printed they will know where to file them. If you don’t have a filing system set up, let them do it for you. You may print/cut out/use the form below, or you may [click here for an editable excel version](#).

Look Books	Team Building Brochures	Starter Kit Flyer
Sign In Sheets	Sales Slips	Pre-Profile Forms
Birthday Cards	Anniversary Cards	Feedback Forms
Closing Sheets	Address Labels (<i>blank</i>)	Color Cards
Misc Ideas	Beauty Books	Business Cards
Postcards	Career Pins	Ribbons
Hostess Brochure	Outside Order Forms	Ready, Set, Sell

CHECKING/SHELVING NEW PRODUCT

When product or section 2 arrive, have your assistant check each item/quantity is received ok. Then, show them briefly how/where to unpack items. You need only show them one item - i.e. *“This is where the Foundations are kept, you can see the shade posted here on the box. We rotate them by adding the new items to the rear. You would do the same with the remaining products, just be sure to check the type/shade, as some items are for dry skin, some for oily.”*

Give them a Look Book to keep on hand for reference. Show them where you would like limited/seasonal items to go.

Have them ask you if they have questions.

PACKING ORDERS

Help them put together an example order just as you would deliver it. If you include a gift w/purchase, samplers, candy, coupons... what ever you normally include - walk them through a mock order (*keep it near your product for them to use as an example - you might use empty boxes from personal use/demo vs. using actual product*).

Once orders are filled, have them tape the sales slip to the bag and place them in a specified location (*i.e. on my desk, in the car...etc.*)

You might want to do a quick check.

You may print/cut out/use the form for packing, or you may [click here for an editable excel version](#).

Filling Customer Orders
Include the following:
Please let me know when when we have less than ____ of any of the contents needed for filling orders - THANKS!

LINKS TO ADDITIONAL RESOURCES

You may find these resources online at
<http://www.shanisoffice.com/delegation-guide-1.html>

Want to modify any of the forms
used in this guide?

[Click here for an excel spreadsheet
with the forms included in this guide.](#)

Thank you to those who have designed & shared resources!

[Team Building/Starter Kit Flyer](#)

[Hostess Checklist *\(back\)*](#)

[How to Coach a Guest](#)

[Imagine the Possibilities Survey](#)

[Success Binder "Director Style"](#)

[Generic Feedback Form](#)

[Outside Order Form](#)

[\\$100 FREE Come Party with Me](#)

[Parties the MK Way](#)

[Think Pink Form](#)

[Consultant Sign In Sheet](#)

[Guest Sign In Sheet](#)

[Hostess \\$100 Free Brochure](#)

[Hostess \\$200 Free Brochure](#)

[Facial In A Bag Instructions *\(Pink/Purple\)*](#)

[PMS Script](#)

[Web Party](#)

[Closing Set Sheet *\(Top Sets\)*](#)

[Postcards/Flyers](#)

NEXT STEP:

NOTE: We are likely to include links in your eGuide to instructional videos (*for the remaining Guides*) that will train your assistant on various computer tasks and programs. The eGuides are set up so you may pick/choose the topics to implement and when to do so. Each has specific pages for you and for your assistant.

DELEGATION 2

ASSISTANT LEVEL OF EXPERIENCE = 1

Delegation 2 is for assistants with experience working with you, basic computer knowledge and those who can complete and understand the Delegation 1 basics. Delegation 2 will begin to work on basic computer/email skills and will include such topics as:

- Tracking Contest/Prize Winners
- Reading Basic Reports
- Ordering/Mailing Prizes
- Managing Computer Files/Photos
- Answering the Phone/Taking Orders
- Placing Wholesale Orders
- Sending the Welcome Email/Email Basics
- Additional Tips

Also Includes:

- Report Sheets for easy Reference
- Our actual folder System (*we manage 60k+ files/images*)
- Excel Training Video & Templates for Weekly/Monthly Tracking
- Welcome Template

It is suggested that you begin the next level with your Assistant once you both are confident and satisfied in the tasks they currently Perform. Remember that adding to their work will increase their pay, and again - **delegating is to create more productive activity (IPA) time for you - get you making more money!**