

Busy Entrepreneur Delegates his Daily Email and Inbox Management



A Client Case Study

Client: Fitness Entrepreneur and Public Figure

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About Delegate Solutions:

We are your strategic support team. Our service is designed to be a reliable, professional, on-demand solution for all your administrative needs. Our mission is to simply make your life easier so you can focus on your best work.

delegate*

Executive Summary

Busy high-profile entrepreneur is drowning in the day-to-day management of his email inbox. Between internal email from his team, and external email from vendors and clients, he is left with little time to focus on his Unique Ability® to grow his company. This overwhelming but necessary task is distracting and causing him to work excessive hours just to keep up. Because of this drain of his time, he is unable to take time off from his business and is operating reactively rather than proactively, as he would like.

He requires a personalized solution that can learn his style, understand his priorities, key contacts and allow him to focus only on actionable items that require his specific attention.

Our work with this client allowed him to successfully free up 10-15 hours per week of his time to focus on growing his organization. Our off-site team worked to develop an email delegation strategy that relieved him of the burden of managing his own inbox. Since client is frequently “on the road,” we provide daily updates via phone, thus eliminating the need for him to be at a computer.

Client Challenges

Client initially approached us in a state of frustration with his inbox. His original stated goal was to help him attain “inbox zero;” meaning a clean inbox with emails filed and answered. However, after our intake conversation, we determined that the client was ultimately seeking assurance that any tasks “hiding” in email for him were processed, addressed on his behalf, and/or assigned to him.

Part of his initial email overwhelm stemmed from his internal team copying him on day to day details he didn’t need to be a part of. In addition to that, without a proper gatekeeper in place, Client did not have a line of defense in place to guard his time or help manage his key responsibilities to his team and vendors.

How Our Service Helped

We immediately worked with the Client to develop a customized Action Plan based on his goals and needs. We collected his key contacts, communication preferences and ensured we could access his inbox, calendar and other necessary tools. We configured and deployed Asana as a repository for tasks that required his attention.

Our Strategic Support Team was paired with the Client. Our team worked with him daily to review inbox items, understand how he wanted to see the emails and tasks processed, and helped him turn emails into actionable tasks.

Three times daily, we process through his email and summarize back and forth communication into a brief status update for him. Our team works on his behalf to forward messages to appropriate people,

provide gate-keeping for his calendar and effectively keep track of deadlines and priorities. His team now looks to our team first, when they need the Client to take action on various items. Most importantly, we turn any emails we cannot resolve on our own into actionable tasks for the Client to address in Asana.

Results, Return on Investment and Future Plans

Client has now freed up 2-3 hours per day (nearly 200 hours to date) of his valuable time by delegating his email inbox management and processing. He counts on our capable team daily to keep him updated, accountable to his stated priorities and to help him focus on key tasks. Our support has allowed him to create the headspace for downtime and creativity in his business. He recently launched a successful new product line, and is focusing on PR opportunities such as interviews, appearances and contributing to magazine articles, rather than the management of his inbox.

In the future, he plans to utilize our social media team to deploy custom strategy and content to promote his brand and his new product line.

Client Testimonial



“Since deploying my support team at Delegate, I no longer have to waste time keeping on top of my email. Their help has allowed me to not only focus on the most impactful activities in my business, but it has created space for downtime to focus on other parts of my life beyond business. It’s a tremendous relief to know that I no longer have to worry about the day-to-day communication in my inbox. Their expertise and accountability created an amazing system that has made a huge difference in how I operate.”

Technology Utilized:



Struggling with something similar? We’d love to help! Schedule your own FREE Delegation Consult today to learn how we can simply clear your plate!