MotionOps

CONTRACTOR SCALER HUB · GET OUT OF THE OWNER BOTTLENECK

Delegation Matrix

For lesson 3. Sit down with the person who'll own the responsibility you picked in lesson 2. Write one decision agreement for each decision that comes with it, test it on three real cases, then collect the agreements in your delegation matrix.

1. The decisions behind the task

Handing over a task isn't enough. To get it off your desk for good, hand over the decisions that come with it, with limits.

A task	A decision that comes with it
Example Enter the job on the calendar	Move a job when the customer asks
Example Order materials for next week	Switch to a different supplier when one is out of stock
Example Write up the change order	Approve the extra work on site
Example Send the invoice	Agree to split the payment

2. Five levels of authority

Level	What the person does	Example
1. Do as asked	You decide, they carry it out	You pick the new date, they call the customer
2. Recommend	They look into it and suggest; you decide	"Thursday works for crew 2. Should I book it?"
3. Decide, check before acting	They decide, tell you and act unless you object	"I'm moving it to Thursday unless you say otherwise"
4. Decide and act, tell you after	They act and let you know	"Moved Henderson to Thursday, crew 2. Customer confirmed."
5. Decide and act	They act; you see it in your regular review	Nothing reaches you. It shows up on the weekly job review

Start at level 3 and move to level 4 after a few weeks of good decisions. Level 5 is for decisions that are routine, low risk and well understood. If someone keeps calling about a decision you handed over, check which level you actually gave: often it was level 2 without anyone saying so.

3. The decision agreement: one per decision

Fill in the seven parts together. They'll spot gaps you can't see from the owner's chair. One agreement is one row of your delegation matrix.

1. THE DECISION, IN PLAIN WORDS ("MOVE A SCHEDULED JOB TO A NEW DATE")

2. WHO OWNS IT: ONE PERSON, BY ROLE, NOT "THE OFFICE"

3. LEVEL (START AT 3)

4. INFORMATION THEY USE TO DECIDE WELL, AND WHERE IT LIVES

5. THEY CAN DECIDE ALONE WHEN: THE LIMITS. BE SPECIFIC: DAYS, AMOUNTS, JOB TYPES.

6. THEY CALL ME WHEN: ANYTHING OUTSIDE THE LIMITS, PLUS THE SITUATIONS THAT ARE RISKY EVEN INSIDE THEM

7. HOW IT'S RECORDED AND SHARED: WHO NEEDS TO KNOW, AND WHERE THE DECISION IS WRITTEN DOWN SO THE OFFICE AND THE FIELD SEE THE SAME THING

REVIEW DATE, TWO TO FOUR WEEKS OUT

AGREED BY, BOTH OF US, ON

Two filled-in agreements

A remodeling company with two crews. **The limits are examples. Set your own.**

Part	Example 1: rescheduling, handed to the office coordinator	Example 2: small change orders, handed to the crew lead
Example Decision	Move a scheduled job to a new date, or swap jobs between crews	Agree to extra work the customer asks for on site
Example Owner	Office coordinator	Crew lead on the job

Part	Example 1: rescheduling, handed to the office coordinator	Example 2: small change orders, handed to the crew lead
Example Level	3 for the first two weeks, then 4	3 for the first five change orders, then 4
Example Information	The shared schedule, which crew can do which work, typical job durations, who's off	The price list, the approved scope, the change order process
Example Can decide alone when	The move is 3 working days or less; the customer agrees; a crew with the right skills is free; the price doesn't change	The extra is on the price list; it's under $500 (the owner's chosen limit in this example); it doesn't change the schedule by more than half a day
Example Calls the owner when	The move is longer than 3 working days; it affects an inspection or a subcontractor's date; it needs overtime; the customer is upset or talks about cancelling	It's over $500 or not on the price list; it touches structure, permits or inspections; the customer disputes the price
Example Recorded and shared	Updated on the schedule the same day; the crew lead gets told before the end of the day; a note on the job saying why it moved	Change order written, priced and signed by the customer **before** the work starts; the office is told the same day so it gets invoiced
Example Review	Two weeks from today	After the first five change orders

4. Choosing a limit like $500

There's no right number for every business. Pick an amount that:

- [ ] I could absorb if the decision went wrong
- [ ] Covers the small extras that come up most often
- [ ] Fits the person's experience
- [ ] Starts lower; I raise it once I've seen a few weeks of good calls

THE LIMIT WE'RE STARTING WITH

DATE WE LOOK AT RAISING IT

5. Walk through three real cases

Pick three from the last month and ask: "What would you have done here?" If their answers match yours, the limits are clear. If they don't, fix the wording.

Real case from the last month	What they would have done	What I would have done	Match?

6. Your delegation matrix

Start with three or four decisions, not twenty, and include what **doesn't** move, so nobody guesses. The tinted rows are examples, not recommendations for your business.

Decision	Owner	Level	Can decide alone when	Calls the owner when	Recorded where	Review
Example Move a scheduled job	Office coordinator	3 → 4	≤ 3 working days, customer agrees, crew free	Longer move, inspection or sub affected, unhappy customer	Schedule + job note	In 2 weeks
Example Approve a small change order	Crew lead	3 → 4	On the price list, under your limit	Over the limit, structural, disputed	Signed change order	After 5 change orders
Example Order materials for a scheduled job	Office coordinator	4	Approved supplier, matches the estimate	Over the estimate, supplier out of stock on key items	Purchase order on the job	Monthly
Example Approve a day of overtime	Crew lead	3	Job finishes that day, customer deadline at risk	More than one day, or a second crew affected	Timesheet note	Monthly
Example Send the invoice for a finished job	Office coordinator	5	Closeout checklist complete	Unbilled extras, disputed items	Invoice + job record	Weekly review
Example Offer a discount to close a sale	Estimator	2	Never alone: recommends	Every time	Note on the proposal	Quarterly

7. Tell everyone who decides now

Tell the office, the crews and anyone else who used to come to you. When someone calls you anyway, send them to the person instead of answering. The first few times feel slower; that's how the new habit forms.

> TOLD THE OFFICE ON: _____ TOLD THE CREWS ON: _____
> [Moving jobs] is [the coordinator's] call now.

8. When they make a call you wouldn't have made

- **Inside the limits:** let it stand, even if you'd have done it differently. Then ask whether the limits need to change, and change them for next time. Reversing it changes the rules without telling anyone, and they'll go back to asking about everything.
- **Outside the limits:** talk about it privately and go back over the agreement. Was the limit unclear, or was it ignored? Those need different fixes.

What to review on the review date

Look at the exceptions, not every decision. Raise the level when the calls have been good, and write the new level down.

Count	What it tells you	Number
Decisions made within the limits	These are the ones that no longer reached you	
Escalations that didn't need you	If there are many, the limits are too narrow or unclear	
Decisions that should have reached you but didn't	The limits are too wide, or the triggers are missing	

NEW LEVEL, WRITTEN DOWN

NEXT REVIEW DATE