MotionOps

CONTRACTOR SCALER HUB · GET OUT OF THE OWNER BOTTLENECK

Keep or Hand Off Worksheet

For lesson 2. Take your interruption log from lesson 1 (or last week's calendar, texts and call history) and sort every item into four groups. Then write down three answers and prepare the one responsibility you'll hand off first.

1. The four groups and their tests

Group	Test	Examples
Keep: real owner decisions	Would a wrong call here hurt the business for months, not days?	Pricing policy, which kind of work to chase, who you hire and let go, a serious customer dispute, your bank and insurance decisions
Hand off: repeatable work with rules	Could you write down how to do it on one page?	Confirming tomorrow's appointments, placing jobs on the calendar within your rules, ordering materials from an approved list, sending invoices for finished work
Write it down once: the answer exists, it just isn't written	Is this the same question as last week?	What the customer picked, what you charge for a standard job, the gate code, how you close out a job
Stop: nobody should do it, or not at your level	What would actually happen if this stopped next week? If the honest answer is "nothing much," stop it.	Driving to the supplier for something they would deliver, double-checking small estimates that are never wrong, a weekly report nobody reads

2. Sort the log, one line at a time

The tinted rows are the lesson's example, a remodeler with two crews, made up to show the method.

Item from the log	Group	Why
Example "Which tile did the customer pick?"	Write it down once	The answer exists; the crew just can't see it
Example "What do we charge for a vanity swap?"	Write it down once	A standard job needs a written price, not a phone call
Example "Can we move the Henderson start to Thursday?"	Hand off	Rescheduling repeats every week and can follow rules
Example "Can we add an outlet for the customer?"	Hand off	Small change orders can be approved by the crew lead within a limit

Item from the log	Group	Why
Example "Can the invoice go out before the punch list is done?"	Write it down once	This is a closeout rule the office needs once
Example Driving to the supplier on Wednesday	Stop	The supplier delivers; the owner was filling a gap in ordering
Example "Should we bid the commercial job?"	Keep	It changes what the company does

Count each group. In the example, out of seven items: one Keep, three Write it down once, one Stop, two Hand off.

KEEP	HAND OFF	WRITE IT DOWN ONCE	STOP

3. Split mixed tasks: the direction you keep, the execution you hand off

Task	Direction I keep	Execution I hand off
Example Pricing	Target margins and how we price new kinds of work	Pricing standard jobs from the price list
Example Scheduling	Which jobs get priority and how many crews we run	Putting jobs on the calendar and moving them within the rules
Example Customer service	Warranty and refund policy, and serious complaints	Routine updates and callbacks
Example Purchasing	Which suppliers we use and our account terms	Ordering for scheduled jobs

Task	Direction I keep	Execution I hand off

EXCEPTIONS THAT STILL COME TO ME, WRITTEN AS CLEAR RULES. "ANYTHING OVER OUR NORMAL JOB SIZE COMES TO ME" IS A CLEAR RULE; "CALL ME IF IT'S WEIRD" IS NOT.

4. Write it down once: the three most common questions

Write each answer where the people who need it can find it. These need nobody to take them over, and they're usually the quickest win: do them this week, alongside your one handoff.

Question that keeps coming back	The answer	Where it's written now

5. Pick one responsibility to hand off

One from your Hand off group, not ten. A good first one:

- [ ] **Repeats every week,** so the person gets practice fast
- [ ] **Costs me real time,** so I feel the difference
- [ ] **Can be written as rules,** so it doesn't depend on my judgment
- [ ] **Has someone ready** to take it, with the time to do it
- [ ] **Is fixable when it goes wrong,** so a mistake costs a phone call, not a customer

THE RESPONSIBILITY (EXAMPLE: RESCHEDULING WITHIN RULES)

HANDED TO (EXAMPLE: THE OFFICE COORDINATOR)

6. What they need before they take it over

Delegation fails when the task moves but what makes it doable stays with you. The authority row is where most handoffs go wrong: lesson 3 sets those limits.

Needs	The question to ask	Example: scheduling	For my handoff
Skills	Can they do the work, or what training do they need?	The coordinator has used the calendar but hasn't planned a whole week	
Information	Where is everything you know about it?	Which crew handles which jobs, typical job durations, who's off	
Authority	What can they decide alone, and when do they call you?	They can move a job up to three days if the customer agrees; anything longer comes to you	
Time	Does it fit in their week? What comes off their plate?	Filing supplier receipts moves to someone else, so the time is really there	

IF NOBODY ON THE TEAM HAS TIME FOR THE SCHEDULING, CUSTOMER CALLS AND PAPERWORK IN YOUR LOG, NOTE THE GAP: THE ROLE YOU NEED MAY BE AN OFFICE COORDINATOR BEFORE ANOTHER CREW MEMBER.

What to review next week

How many of the same execution tasks still reached you, compared with this week's log. The number should start to fall once the written answers are in place.

SAME EXECUTION TASKS THAT REACHED ME THIS WEEK

SAME EXECUTION TASKS THAT REACHED ME NEXT WEEK