

# The High- Volume Agent Delegation Guide

How to Reduce Burnout Without Slowing Down



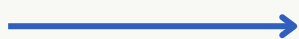
# 1. Protect the Agent Role

Your time should be spent on work that directly creates or protects revenue.

## **Agent-Only Work (Do Not Delegate):**

- Client conversations and advising
- Plan recommendations and enrollments
- Relationship-building and trust-based discussions
- Strategic decisions and business direction

If a task does not require your license, judgment, or relationship, it does not belong here.



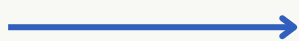
## 2. Identify Delegation Targets

These tasks are the most common burnout drivers and the easiest to offload.

### **High-Impact Tasks to Delegate First:**

- Appointment scheduling and confirmations
- Reminder calls, texts, or emails
- Basic client follow-ups
- Document collection and intake
- Status updates and routine service requests

Delegating just one category can create immediate relief.



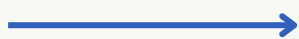
# 3. Simplify Before You Delegate

Delegation works best when tasks are repeatable.

## **Before handing off a task:**

- Replace custom emails with templates
- Standardize intake questions
- Create a short checklist for common requests
- Document the “normal” way the task gets done

If a task requires constant explanation, it isn't ready to delegate yet.



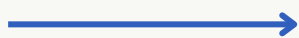
# 4. Choose the Right Support Method

The method matters less than the outcome: the task no longer depends on you.

**Options include:**

- Administrative support
- Virtual assistants
- Shared service teams
- CRM automation and workflows

Start small. Expand only after the first handoff works smoothly.



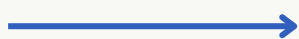
# 5. Design Smarter Workflows

Burnout often comes from decision fatigue, not workload.

## **Reduce decisions by:**

- Automating reminders and follow-ups
- Using templates for common communication
- Creating repeatable enrollment and service flows
- Eliminating “figure it out every time” tasks

Systems should replace memory wherever possible.



# 6. Use This Weekly Check

## **Ask yourself:**

- Am I the only person who can move this task forward?
- Did small tasks interrupt my focus today?
- Does time off feel restorative or stressful?

If stress is creeping in, delegation needs to go further.

## **Key Reminder**

You don't need more discipline.

You need fewer decisions.

Delegation isn't about doing less. It's about doing the right work consistently, without carrying everything yourself.