
From Overwhelmed to Organized: Delegation & Systems for Small Business Owners

Sample Instructional Design Work

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Designing structured, engaging learning experiences that drive clarity and action

Case Study

Project Overview

Designed a 1-hour interactive workshop to help small business owners reduce overwhelm by identifying opportunities for delegation and system support.

The Problem

Small business owners were managing multiple operational roles, leading to overwhelm, inefficiency, and limited scalability.

The Solution

Developed a structured learning experience combining mindset shift and practical execution using a proprietary delegation framework.

My Approach

- Applied adult learning principles
- Designed interactive engagement (call-and-response, movement)
- Incorporated real-time task mapping
- Created actionable takeaways for immediate implementation

The Outcome

Participants leave with:

- A categorized task list
- A delegation strategy
- Immediate next steps to improve efficiency

From Overwhelmed to Organized: Delegation & Systems for Small Business Owners

Audience

Small business owners managing multiple operational roles without structured support systems.

Learning Objectives

- Identify tasks that contribute to overwhelm
- Categorize responsibilities using a framework that allows them to decipher how to delegate
- Develop an initial delegation and systems plan
- Take immediate action toward redistributing workload

Workshop Overview

This 1-hour interactive workshop helps small business owners reduce overwhelm by identifying opportunities for delegation and system support.

Workshop Flow

1. Awareness — Why You're Overwhelmed

Participants identify the multiple roles they manage and recognize that support is necessary for scaling.

2. Reframing — You Don't Have to Do It All

Participants shift from self-reliance to understanding the value of teams and systems.

3. Strategy — What Can Be Released

Introduction to a structured framework for defining ownership and responsibility across tasks

4. Action — Your Delegation Plan

Participants create a plan to delegate or systemize tasks and take immediate action.

Instructional Approach

This workshop incorporates adult learning principles through:

- Interactive participation (call-and-response, movement-based engagement)
- Reflection exercises
- Real-time task mapping
- Immediate application and action planning

Outcome

Participants leave with a categorized task list, a delegation strategy, and clear next steps.

Workshop Worksheet: Delegation & Systems

1. Weekly Task Brain Dump

List all the business related tasks you do in a typical week:

2. Task Categorization (A / B / C)

Label each task:

A= Primary / B = Secondary / C = System

(Circle your letter in front of the tasks that are your heaviest weight.)

3. Top 5 Tasks to Release

- 1.
- 2.
- 3.
- 4.
- 5.

4. Resource Mapping

Time to identifying support

5. Immediate Action Plan

First step (within 24 hours):

Timeline:

Support Needed:

Reflection Questions

- What would change if I implemented this system?
- What is one action I can take?
- What resource can I activate immediately?
- How will I feel in 3 months with support in place?
- What becomes possible when I release these tasks?