

### What to Delegate?

Step 1.

List as many of your tasks, activities and responsibilities as you can.

Step 2.

Place a tick or mark next to any tasks that, theoretically [and unemotionally], could be delegated. This is not about the tasks you like doing, be as objective as you can.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

### Who? Choose the “Right” Person

From the list of tasks above that you identified that could be delegated...

1. Pick a task and clearly describe it:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. How urgent is the task:                      High                      Medium                      Low

How important is the task:                      High                      Medium                      Low

3. What outcomes do you want and expect? (what does success look like):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. Who would be the most competent and committed person for this task?

---

Why? \_\_\_\_\_

---

What would be their motivation? [Yes, you are guessing.] \_\_\_\_\_

---

5. Who would be the most appropriate candidate for this as a developmental task?

---

Why? \_\_\_\_\_

---

What would be their motivation? \_\_\_\_\_

---

6. What is the development level of this person, for this task?

---

---

7. Do I have the time required to work with this person to ensure that he/she would be successful?

---

NOTE: If competency is low but willingness is high, match the person you identified at number 4 to this person so that they may work together to achieve the task. This frees you and gives even greater responsibility opportunities for the person you identified at number 4.

**Delegation Conversation (Implementation of the plan)**

**1. Explain the Assignment:**

Details appropriate for employee  
Task importance  
Standards  
Outcome

---

---

---

**2. Test Understanding:**

Use questions to check understanding

---

---

---

**3. Identify Problems / Gaps:**

Discuss potential problems, roadblocks and gaps to the success of the task completion  
Ask employee what might hinder success  
Problem solve together

---

---

---

**4. Set Milestones:**

Avoid micro managing and over-supervising by discussing and setting progress milestones and agreeing how progress will be reported.  
Rather than telling, ask the person how they like to be held accountable.

---

---

---

**5. Summarise:**

Ask employee to summarise their understanding of the task, problem-solving strategies and progress-reporting schedule.

Stick to what you have agreed! Follow up is as essential as the first step in the delegation process.