



DELEGATION PLAN

TASK IDENTIFICATION:

Give a thorough description of the task or project. It is better to have more information than not enough.

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PURPOSE:

Why does this task or project needs to be executed? What is its importance, Answering this helps the delegate to understand the value of the delegation and task or project, and to take more ownership. This leads to more engagement and investment in a successful outcome.

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WILL VERSUS SKILL:

Who is the best person to undertake this task or project? Is this simply task allocation or a development opportunity? What skills are needed and what skills might need to be developed? Is there capacity to undertake this task or project or will other work need to be re-prioritised?

Task Allocation

Development Opportunity
(I develop the Delegate)

Delegate Could
Develop Someone

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WHAT'S IN IT FOR THEM:

Why should the delegate take on this task or project? What will the delegate gain from doing this work?

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STAKEHOLDERS:

Who will be affected by the outcome of the task or project?

Who will be affected while this task or project is being executed?

Who needs to know the delegate is responsible for this task or project?

So that the right people know who to go to during the course of the delegation: Who needs to know?

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RESOURCES AVAILABLE:

What resources are at the delegate's disposal to execute the task or project? These can include other people, physical resources, budget, external source, etc. It is essential to never assume the delegate will know what they can or cannot use or spend.

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A SUCCESSFUL OUTCOME LOOKS LIKE...

Describe what a successful outcome will look like. Having this clear helps to ensure both you and the delegate are working from the same understanding.

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POSSIBLE ROADBLOCKS:

What will hinder the success of this project? Identify as many roadblocks and objections to success as you can think of and note down your ideas to get around or resolve them. This segment of the plan can be completed in conversation with the delegate however taking the



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time to think through problems and solutions helps you be more prepared for delegating and be more confident and feel in control.

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SUPPORT:

How will you support the delegate? Consider what you believe is realistic support and discuss this with the delegate to come to an agreement of level and type of support. This can be reviewed and changed as the delegation process continues.

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DEADLINES AND MILESTONES:

When must this whole task or project be completed? What milestones do you think need to be met for progress: these need to be agreed with the delegatee but it helps for you to have considered these in the planning. What are the consequences for incomplete? Linked to the purpose or the 'why' of the project, it might help to also understand what it means to the delegatee, clients/customers, team and organisation if the task or project fails. This is NOT about creating a threat, it's about ensuring greater clarity of the task importance.

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LESSONS:

What has been learned from this delegation?

Use the more indepth Delegation Lessons Form if you want to unpack this segment in more detail. This would be useful for those new to delegation: either delegating or being a delegate.

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ACKNOWLEDGEMENTS:

How does the delegate like to be acknowledged? What do you need to acknowledge from this task or project? What did you think went well? Be specific.

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IMPROVED PLANNING:

Without reflection there's no point trying to be a better delegator. What will you start, stop, change and continue next time you delegate?

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FURTHER HELP:

If you have any questions or comments please do reach out. If you'd like a workshop or coaching on delegation, let's talk and make it happen: sally@sallyfoleylewis.com.