

Delegation Planner

Choose a task that you need to delegate to someone on your team, and use this worksheet to prepare for the conversation.

WORK TO BE DELEGATED: What is the task/work to be delegated?

WHOM TO DELEGATE TO: Who is this person and what is his or her level of skill/experience/will to do the work?

THE WHY: Why is this work important?

THE WHAT: Desired results: What are the desired results? Express the answer in this format: "From X to Y by When."

GUIDELINES: Define the guidelines—the standards and conditions that must be met.

RESOURCES: Define the resources required to complete the work (people, budget, tools).

ACCOUNTABILITY: Decide how to track progress and be accountable.

CONSEQUENCES: Define specifically and measurably the benefits from successful achievement of the work, as well as what will happen if the work is not completed.