

Delegation Worksheet

Manager: _____

Ultimate Approver: _____

Owner: _____

Task or Project: _____

Step 1

Establish Shared Expectations

Success What does success look like?

Deadline By when does it need to be completed? _____

Importance Where does it fall relative to other priorities?

Resources What physical resources are available?

Who else needs to be involved or is available to help?

Consult with: _____

When: _____

Available to help: _____

For what: _____

Guidance What tips can you pass on?

What examples of success can you share?

How will you check for alignment?

Verbal Repeat
Back

Written Repeat
Back

Project Plan

Other

Delegation Worksheet

Step 2 Stay Involved

How will you stay connected to the owner and the work?

What specific activities or results will you want to review or see in action to monitor progress?

Step 3 Adapt Your Approach

How hands-on is the situation?

How might you need to flex your behavioral style?

Step 4 Follow-Up to Promote Accountability & Learning

When and how will you debrief?
