



DELEGATION CHECKLIST

PREPARATION PHASE

- _____ 1. Specify the goals of the delegation.
- _____ 2. Specify the job to be delegated (what needs to be done):
 - _____ a. Results expected;
 - _____ b. Materials, resources, and information needed;
 - _____ c. Relevant policies and procedures to be considered;
 - _____ d. Time frame for project; and
 - _____ e. Others involved in project (suppliers, others doing parts of the work, etc.)
- _____ 3. Decide to whom the task will be delegated:
 - _____ a. Consider employees' abilities, knowledge, interests, experience, developmental goals, and so forth;
 - _____ b. Consider employees' current work loads; and
 - _____ c. Consider the types of tasks and/or projects that employees are currently working on.



PLANNING PHASE

- _____ 1. Explain the reasons for delegating to this person.
- _____ 2. Describe the project clearly (results expected and so forth), including how the project fits into the larger scheme of things.
- _____ 3. Ask the employee to prepare a plan of how to accomplish the job and to specify what obstacles he or she anticipates as well as ways to avoid or deal with these obstacles.
- _____ 4. Establish a meeting time to discuss the employee's ideas and determine how long the meeting will last.
- _____ 5. Arrange for the meeting to take place in a nonthreatening location.

DISCUSSION PHASE

- _____ 1. Review the project objectives with the employee.
- _____ 2. Verify that the goals are understood.
- _____ 3. Discuss ideas on how he or she plans to proceed, what obstacles are anticipated, and how these obstacles can be avoided or dealt with.
- _____ 4. Specify the resources that will be made available and make any necessary introductions to others who will be involved in the project.
- _____ 5. Tell the employee how much authority he/she will have.
- _____ 6. Discuss how much follow-up to expect; establish checkpoints.
- _____ 7. Emphasize the employee's responsibility for the outcomes.



AUDIT PHASE

- _____ 1. Monitor the progress of the delegation; compare time expended to time frames established in preparation phase.
- _____ 2. Set intermediate goals for course corrections where necessary; make adjustments in response to unforeseen problems.
- _____ 3. Ensure that needed materials, resources, and so forth are available to the employee.
- _____ 4. Discuss problems and progress at designated checkpoints and/or as needed.
- _____ 5. Offer encouragement; do not revoke the delegation or begin to perform certain elements of the task yourself.

APPRECIATION PHASE

- _____ 1. Accept the completed project and acknowledge the employee's efforts.
- _____ 2. Do not accept unfinished, inaccurate, unprofessional, or off-target work.
- _____ 3. Show an interest in the results; reward the employee for achievements.
- _____ 4. Accept your own accountability. Do not blame the employee for less-than-satisfying results for which you may be responsible.
- _____ 5. Review the delegation process and what has been learned.

To request a free 30-minute consultation
to succeed at delegating, [click here](#).