

Delegation Worksheet

A preparation tool for project leaders and managers to set people up for success

| I am [r assigning _ | name] | the res of | ponsibility [proj | ect] | | | |
|---|---------|---------------|--------------------------|-----------|----------|--|--|
| Step 1: Getting Clear on Your Expectations (the 5 W's and how) | | | | | | | |
| We sometimes call this part The 5W's (what, why, where, when, who). Always discuss your thinking with your staff member or team, seek perspective, and check your <u>PTRs</u> before you delegate. | | | | | | | |
| Begin at the end: What outcomes are you looking for? What would success look like? How will you make the implicit explicit? | | | | | | | |
| Why is this task important? Why X [name of staff person]? Why this? Why now? | | | | | | | |
| When does it need to be completed by? What are benchmarks along the way? | | | | | | | |
| Where else can they go for resources, examples, or advice? | | | | | | | |
| | Manager | Owner | Consulted | Helper(s) | Approver | | |
| Who else should be involved? The MOCHA for this task is: | | | | | | | |
| | | | | | | | |

| Are any specific approaches (mindsets, values, etc.) needed for this assignment? Remember to distinguish requirements from preferences or traditions. | | | | | | | |
|--|-----------|----------|--|--|--|--|--|
| How will you seek their perspective and adapt to input? | | | | | | | |
| How will you make sure you and your staff member are aligned on key points and next steps? → Verbal repeat-back → Written repeat-back → Other (specify): | | | | | | | |
| Step 2: Stay Engaged | | | | | | | |
| What specific products or activities (e.g., outlines, data, drafts, etc.) will you want to review or see in action to monitor progress? | | | | | | | |
| Early Slice | Midstream | Back End | | | | | |
| | | | | | | | |
| Date: | Date: | Date: | | | | | |
| Step 3: Debrief | | | | | | | |
| Step 5. Debrief | | | | | | | |
| Create a plan for accountability and learning—yours and theirs. | | | | | | | |
| When and how will you <u>debrief</u> how things went? What questions will you ask? What feedback will you seek or offer about what went well and what could be improved? | | | | | | | |

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Step 4: Adapt Your Approach

Given the difficulty and importance of the task and my staff member's will and skill for this project or assignment, my approach should generally be:

- → Very in the mix
- → In the mix
- → Mostly out of the mix