

Delegation Worksheet

Identify a task or project you would like to delegate: _____

Step 1: Define the Outcome and Key Tasks

- What does the result need to “look like?” What outcome is needed? What needs to be done? Why does this need to be done? What background information will you need to share? How does the task or project fit with other work - its importance?

Step 2: Select the employee and determine if you are delegating for results or development

- What timeframe are you working with? *Shorter timeframe select someone who can easily pick up the task so you can delegate for results.*
- Can this be a growth opportunity for someone? *If yes, make this an opportunity for development.*
- What traits are needed for the task? *Ideally we want to align tasks with people’s strengths.*

Employee you selected: _____

Delegating for Results or Development with this employee: _____

Step 3: Identify your DiSC Style & the Employee’s Style

What is your DiSC Style? _____ What is the DiSC Style of the employee? _____

Step 4: Create your plan and determine your approach.

Think about the items below and make note of additional information you will need to communicate to the employee.

- Are the outcomes and expectations clear and thorough for this person?
- How much freedom will this person want in how the work is done?
- How much background will the person need?
- What follow up should I do to ensure understanding and to check on progress?
- What milestones will be important?
- What additional information should be discussed with the employee as you delegate this work?

Step 5: Identify anyone else you need to communicate to re: this task being delegated

Who else you need to let know that you are delegating this work? _____