

Delegation Checklist

- Decide your approach:
 - Very hands-on
 - Moderately hands-on
 - Relatively hands-on

- Share what success looks like on this task or project:
 - _____

- Give ideas of where the team member may go for resources:
 - _____

- Identify who else should be involved:
 - _____

- Provide tips on how to do it, if any:
 - _____

- Clarify how this assignment fits with other priorities
 - _____

- Share why this work matters (i.e. create context for the person):
 - _____

- Explain when the task or project is due:
 - _____

- Agree on expectations:
 - _____

- Request feedback or progress updates; clarify how and when you want feedback /updates:
 - _____

- Add a reminder into your calendar or on your “waiting on” list to check in on this assignment.

NOTES: Use the items on this checklist to guide you in expanding your delegation skills. Customize this checklist, print it out and keep it handy to ensure you're including these items when you delegate. Typically, delegate via email so you have a communication record, and this allows you to identify the source of breakdowns when they occur.