BSCorbett Consulting, LLC

Name:
Date:

4 Steps to Effective Delegation

Step #1: Organize

Identify what you are going to delegate and everything the person will need to successfully complete the task. Provide context to the individual being delegated to—include the "Why" and clearly identify measurable outcomes. Be specific. Remember, you can choose to delegate a piece of a larger project. It doesn't have to be the entire project.

Step #2: Train

Schedule time for training with the person you are delegating to. Determine the most appropriate form(s) of training, such as observation, relevant reading, researching best practices, providing an example of similar work. Have the individual summarize the delegated task(s) in their own words.

Step #3: Entrust & Follow-Up

Set milestones, including specific date(s) and time(s) to complete the assignment. Let go and do not hover. Schedule check-in times to follow-up on progress. If the working relationship is new and/or this is a completely new task for the individual, schedule check-ins more frequently.

Step #4: Celebrate & Evaluate the Experience

Once the task is completed, schedule a time to celebrate the completed assignment. Take time to evaluate the delegation process. To improve future delegation, ask questions and actively listen to the feedback.

a. Was the task completed successfully? If not, provide feedback on the what, how, and why.
b. Was the outcome of the task clearly stated? If not, what would have made it more clear?
c. Did the training prepare the individual for the task?
d. Were the number of check-in appropriate to support the individual with the task?
e. What can be improved for the next delegation?

Reflections

1. Which delegation step is the most challenging for you and why?

2. Which delegation step are you committing to strengthen and why?

3. How & When will you communicate your Effective Delegation Steps with team members?

My Move to ACTion next steps…