

Practical Edge Training
Delegation Planning Worksheet

Delegate with clarity. Empower with trust. Achieve results together.

Date

Employee

Task / Responsibility

1. Desired Outcome

Describe what success looks like.

2. Key Priorities

- 1.
- 2.
- 3.
- 4.
- 5.

3. Resources & Support

What resources, information, authority, or support are needed?

4. Deadline & Milestones

Deadline: _____

Milestone 1: _____

Milestone 2: _____

Milestone 3: _____

5. Communication Plan

Check-in frequency:

Updates expected:

6. Confirmation

Ask the employee to explain the assignment back in their own words.

Delegation Checklist

- ☐ Desired outcome explained
- ☐ Success criteria defined
- ☐ Priorities discussed
- ☐ Resources provided
- ☐ Deadline agreed upon
- ☐ Questions answered
- ☐ Follow-up scheduled

Reflection (After Completion)

What went well?

What could I improve next time?

Employee strengths observed:
