

Delegation Crib Sheet

Essential Steps and Tips for Effective Delegation

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Use this crib sheet to guide your delegation process, ensuring clarity, mutual understanding, and successful outcomes.

1. Task: Define What Needs to Be Done

- Clearly describe the task or project to be delegated.
- Break it down into manageable steps if necessary.
- Be specific about the scope and boundaries of the work.

2. Outcome: What Is the Result?

- Describe the desired end result or deliverable.
- Answer the question: “What does good look like?”
- Include standards, success criteria, or examples where possible.

3. Timescale: When Does This Need to Happen By?

- Set a clear deadline for the overall task.
- Identify any key dates or milestones for certain parts of the task.
- Communicate urgency or any time constraints.

4. Needs: What Information, Tools, Resources, and Support Are Required?

- Clarify what information or context is needed to complete the task.
- List tools, access, or materials required.
- Offer guidance on where to find resources or whom to ask for help.
- Ask the delegatee what else they might need from you to succeed.

5. Check-In Points: Agree Times to Check In on Progress and How

- Decide together on appropriate check-in points (e.g., weekly meetings, email updates).
- Agree on preferred communication methods (in person, chat, call, etc.).
- Schedule check-ins in advance to track progress and address issues early.

- Be clear on what you expect to be updated about at each check-in.

6. Micromanagement: Be Available but Allow Autonomy

- Make yourself available for questions and support, but don't hover.
- Encourage the delegatee to find their own way to the solution.
- Trust their abilities—intervene only if necessary or if requested.
- Offer feedback and recognition at completion or key milestones.

Quick Reference Table

Step	Key Questions	Notes
Task	What needs to be done?	Be specific and clear.
Outcome	What does good look like?	Define success criteria.
Timescale	By when? Any key dates?	Set deadlines and milestones.
Needs	What do you need to succeed?	List resources, info, support.
Check-In Points	When/how will we check progress?	Agree on schedule and method.
Micromanagement	How involved should I be?	Be available, but allow autonomy.

Tip: After delegating, follow up to gather feedback on the process and identify ways to improve future delegation efforts.