Delegation Checklist

The way a manager delegates work has a tremendous impact on employee’s motivation to accomplish the task, and whether the desired results will be achieved. Use this checklist to nail every key aspect of effective delegation and become the kind of leader you’d like to work for.

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| --- | --- | --- |
| 1 | A picture containing drawing, food, mug  Description automatically generated | Define the Desired Results |

**What**. What needs to be accomplished?

**When**. By when must the results be achieved?

**Standards.**  What quality standards must be met?

**Impact**. What will be the impact of accomplishing the desired result? What will be the impact of not accomplishing the desired result?

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| 2 |  | Provide Resources |

**Examples**. What are some examples of what the manager is looking for, as well as examples of what the manager doesn’t want?

**Tools & Templates**. Are there any tools and templates that could help? If not, should one be created?

**Information Sources**. Where might the employee look, and whom might they contact, for pertinent information?

**Budget**. How much budget has been allocated to accomplish the task?

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| 3 |  | Clarify Authorization |

**Go Ahead**. What type of decisions can the delegate make on their own?

**Discuss First**. What types of decisions must the delegate first discuss with their manager?

**Spending Limit**. What is their discretionary spending limit?

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| 4 |  | Establish a Reporting Schedule |

**Regularity**. What day and time of the week will we both typically be available for a call or video conference?

**Frequency**. Should we meet more often than once a week at the beginning of new assignments?

**Agenda**. What are the most important things we should discuss when we meet?

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| 5 |  | Conduct an Assessment |

**Good**. What went particularly well?

**More**. What can we do to make sure these things continue to happen on future assignments?

**Bad**. What didn’t go well?

**Less**. What can we do to make sure these things don’t happen again?