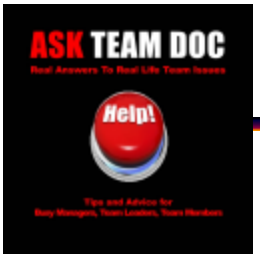

Effective Delegation Planning Guide

Taking the time to plan your delegation activities will help you and your team members be successful. Use the four-step process below. Identify possible tasks to delegate and team member strengths (plus development opportunities) before you dive in.

Step 1: Define tasks to delegate. Start by making a list of those activities that you would consider delegating to a team member.

Step 2: Determine best fit. Then decide which team member would be the best fit and could be most successful at accomplishing the task.

Step 3: Delegate the task. Next, meet with each team member you have identified, identify the objective and set out a plan to check in on a realistic basis to see how it's going.

Step 4: Monitor for success. Make sure you communicate your expectations for "check ins" and what the team member should do if they run into a road block.

To prepare for Step 1, take some time to list those tasks you want to consider delegating. List those below.

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Next, list your team members along with their strengths and possible development activities.

Team Member	Strengths	Development Needed

Almost there! Take your list of tasks (enter in left column) you captured and match them up with the appropriate team member (enter in right column).

Task	Assign to Team Member

Take your time and start delegating those items you've identified above. You don't have to do it all at once. Follow Step 3 and Step 4 to stay on track.

Good luck!