

SCOPING A NEW TASK WHEN DELEGATING

10 STEPS TO COLLABORATIVE DELEGATION

- 10 FEEDBACK ON RESULTS
- 9 SUPPORT & COMMUNICATE
- 8 AGREE DEADLINES
- 7 CONSIDER RESOURCES REQUIRED
- 6 STATE REQUIRED RESULTS
- 5 EXPLAIN IMPORTANCE/BIGGER PICTURE
- 4 ASSESS ABILITY & TRAINING NEEDS
- 3 DEFINE THE TASK OR DECISION
- 2 SELECT THE INDIVIDUAL OR TEAM
- 1 DEVELOP YOUR DELEGATION CRITERIA



Give this document to the person you are delegating a task to - have them take notes and then send you a copy. Use this throughout your check-ins to monitor progress.

| Steps | Notes |
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| Define the Task What is the task that you want done? What does success mean/look like? What are the smaller steps to achieving the task? | |
| Assess the Training Needs What is the skill and motivation level for the | |



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| <p>task? What are the training needs?</p> | |
| <p>Explain the Importance/Big Picture Why is this important?</p> | |
| <p>State Required Results What are the clear outcomes that will demonstrate that the task is complete?</p> | |
| <p>Consider Resources Required What will be required to achieve this task? Time, money, other people?</p> | |
| <p>Agree to Deadlines When will the task be completed? What milestones do you want to track along the way?</p> | |
| <p>Support & Communicate Agree to what the communication plan will be - when and how will you be updated on progress?</p> | |
| <p>Feedback on Results Go over the task once completed and discuss what worked well, what didn't, and what you each learned from the process.</p> | |



