

CHECKLIST:

How to delegate with confidence

A resource for intentional managers and leaders

When stepping up into a management position, you'll need to shift your focus from 'doing' to leading. Effective delegation will ensure you maximise your organisation's resources by dedicating your time and effort to tasks that only you have the expertise and authority to do.

Checklist items:

If you're finding it difficult to handover tasks to your staff, use the checklist below to help you keep them informed, agree on expectations and ensure that passing on work to your teams becomes beneficial to both you and them.

- | | | | |
|--------------------------|---|--------------------------|--|
| <input type="checkbox"/> | 1. Did you provide an overview of what the task is and why it needs to be completed? | <input type="checkbox"/> | 6. Did you clearly explain the extent of authority being delegated? |
| <input type="checkbox"/> | 2. Have you explained why you selected the employee for the task? | <input type="checkbox"/> | 7. Did you specify the budget and other resources available? |
| <input type="checkbox"/> | 3. Did you describe the advantages of completing the task? | <input type="checkbox"/> | 8. Have you asked the employee to describe their understanding? |
| <input type="checkbox"/> | 4. Did you specify the desired outcome, including the deadline? | <input type="checkbox"/> | 9. Did you allow time for questions? |
| <input type="checkbox"/> | 5. Have you involved the employee in defining the work scope, setting the schedule, and deciding how to measure success? | <input type="checkbox"/> | 10. Have you offered support? |



Still struggling?



Here are some tips to help you when developing a delegation plan

1. Know what tasks to delegate

The first step in identifying whether a task can be delegated or not is to ask yourself, “Does this activity require my specific skills or authority?”. If the answer is ‘no’, you can delegate this task to one of your team members. You should also consider whether the employee can complete the job with minimal supervision. Another option that managers can take is to ‘partially’ delegate tasks. For more significant or complex assignments, this method works well as you can look after certain aspects of the job while delegating other components to your team.

2. Understand when not to delegate

It is essential to know what tasks to share with your team and when not to delegate. As a guide, it’s not a good idea to delegate work if the person you are assigning the task either lacks the skills and knowledge to complete it or is already handling a heavy workload. It’s also a bad idea to delegate jobs that are difficult to explain or require your specific expertise and insights. If you are looking to develop a particular skill, it’s best not to delegate tasks that will help you improve this skill.

3. Have a clear purpose for delegating

Don’t delegate for the sake of it. It is best to view delegation as a tool that you can use to help you achieve business goals. So always ask yourself what it is that you are trying to accomplish by delegating a task. Do you view this task as an excellent development opportunity for an employee? Are you looking to reduce your workload by focusing on the most critical tasks? Will delegating help you and your team meet a crucial deadline?

4. Avoid reverse delegation

Some of your actions as a manager may inadvertently encourage reverse delegation – where you may end up doing tasks for your team because they encountered too many barriers and couldn’t complete what you delegated. To avoid this, make sure you provide as much background as possible before assigning a job. Another effective way to ensure your delegated tasks don’t boomerang back to you is to check in with your team on their progress and provide positive reinforcement along the way. This will keep them motivated and encourage them to approach you if they get stuck carrying out the task.

Found this resource helpful?



Our checklist and tips on delegating are taken from our Intentional Leadership™: Foundations program, designed to help professionals master the core skills required to transition from technical specialist to intentional leader.

Find out more about our Foundations program

[Learn more](#)

[Download brochure](#)

We're here to help!

Have a question about our programs? Want to explore tailored in-house opportunities? Interested in other learning and development opportunities? Get in touch!

Call us on:

AUS: 1300 661 061

NZ: 0508 465 269

Or email us at

corporate@managersandleaders.com.au

IMLANZ[®]

