## Steps to Delegation

## Step 1 - Analyze how you spend your time

- Prepare your weekly activities list
- Rate activities in order or importance
- Allocate time
- ID activities you should do but don't have time

Step 2 - Decide with task(s) can be delegated

- Routine tasks
- Temporary tasks
- Time consuming tasks
- Tasks requiring minor decisions


Step 3 - Who can handle which tasks?
Analyze employee's

- Skill
- Capacity
- Personal Desire
- Need for growth
- Current Workload


## Step 4 - Delegate

Provide clear guidance about expectations

- Agree on goals and schedule
- Agree on success measurement
- Agree on level of delegation
- Agree on authority and responsibility
- Meet with staff and explain delegation
- Determine the "what's" not the "how's"


## Step 5 - Get Periodic Feedback

Considerations for task feedback

- Provide constructive evaluation - feedback to the delegate is a critical part of learning
- Document all Agreed upon "corrective action and add to formal performance reviews"
- Consider additional delegation - if the delegatee has performed to expectations, consider additional delegation assignments (but do not ignore other candidates)


## Plan for Delegation

"The softest stroke of a pen is greater than the mightiest of memories" ~ William James

1) Review all the job functions you now perform.
A. List all the tasks you must perform yourself (for example, evaluating employees)
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$\qquad$
B. List those tasks that you know an employee could do, but you haven't bothered to delegate!
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$\qquad$
C. List those tasks you could delegate if you had anyone qualified to handle them.
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2) Delegate all the jobs listed in 1) B. as soon as possible.


## Plan for Delegation

3) What if I have no one trained for a task I need to delegate?
A. List the jobs in item 1) C. (previous page) in the Tasks column of the chart below.
B. Consider the abilities of each employee:

- Do any of them have skills/experience to qualify them for these tasks?
- Could any of them be easily trained for these tasks?
*Don't be overly cautious. He/she might not be able to do a job as well as you, but the work he/she completes on time may be more valuable than the perfect one you finish a week late.
C. List the names of likely candidates in the middle column next to the tasks they might perform. Next to each name, list what training is needed to prepare him/her properly.

| TASKS | CANDIDATES | TRAINING NEEDS |
| :--- | :--- | :--- |
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