

## Delegation

A short tool to take your delegation from automatic to intentional. No right answers, no scores. Type into it, print it, or pin it up.

01

### Bring one to mind

Think of a recent time delegation was at stake. Did you delegate it, or did you hold it back? What was your role? (Boss to a direct report, committee or project lead, peer to peer?) And what was at stake?

02

### Does any of this sound familiar?

MARK ANY. YOU MIGHT SEE MORE THAN ONE, OR NONE.

- It's faster if I just do it.**  
*Quicker, or you know it'll be done to your standard, so you keep it.*
- I hand it off and it comes back.**  
*It comes back half done or not the way you needed, so you stop handing things off.*
- Someone could grow from this, but I'm keeping it.**  
*You could hand it to someone it would stretch, and you're holding on anyway.*
- There's no one to hand it to.**  
*Everyone's slammed, or no one feels ready, so it stays with you.*
- It feels like I have to do it.**  
*Holding it feels like the job, or you wonder what you're for if it's off your plate.*
- I hand off too much, too fast.**  
*You pass things along without enough context or support, and hope it lands.*
- Something else:** \_\_\_\_\_

03

### What could you hand off?

The things that are urgent but not truly important are usually your first candidates.

	URGENT	NOT URGENT
IMPORTANT	<b>Do</b> <i>handle it now</i>	<b>Defer</b> <i>schedule it</i>
NOT IMPORTANT	<b>Delegate</b> <i>hand it off</i>	<b>Delete</b> <i>let it go</i>

What's one thing in your **Delegate** box you could hand off? Name it, and carry it to the next page.

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## What's it for?

What are you delegating it for? To free your own attention (offload), to grow someone else (develop), or both? And if you held it back, what was that about?

05

## Who's it for?

Based on what it's for, who is the right person to hand it to?

### IF TO DEVELOP

Who would be stretched by this? Who is ready for more than they're getting now?

### IF TO OFFLOAD

Who has the capacity and the fit? Who can take it on cleanly?

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## How much room?

Once you know what to hand off, these name how much room you're giving. (Michael Hyatt, 5 Levels of Delegation.)

- |                          |  |
|--------------------------|--|
| 1 Do as I say            | <i>"Here's the task, here's how, do it this way."</i>      |
| 2 Research and report    | <i>"Look into it, tell me what you find, I'll decide."</i> |
| 3 Research and recommend | <i>"Look into it, bring me a plan, I'll OK it."</i>        |
| 4 Decide and inform      | <i>"Make it happen, keep me posted."</i>                   |
| 5 Act independently      | <i>"You've got this."</i>                                  |

*If you're delegating to develop someone, reach for a higher level than feels comfortable. The same task handed to a seasoned teammate and to a brand-new one is not the same level.*

07

## Your move

Picture making one shift. If it goes well, what opens up, for you and for the person you hand it to?

What about you, your habits or tendencies, might make this harder than it sounds?

The next time I will \_\_\_\_\_

I'll come back to this on \_\_\_\_\_