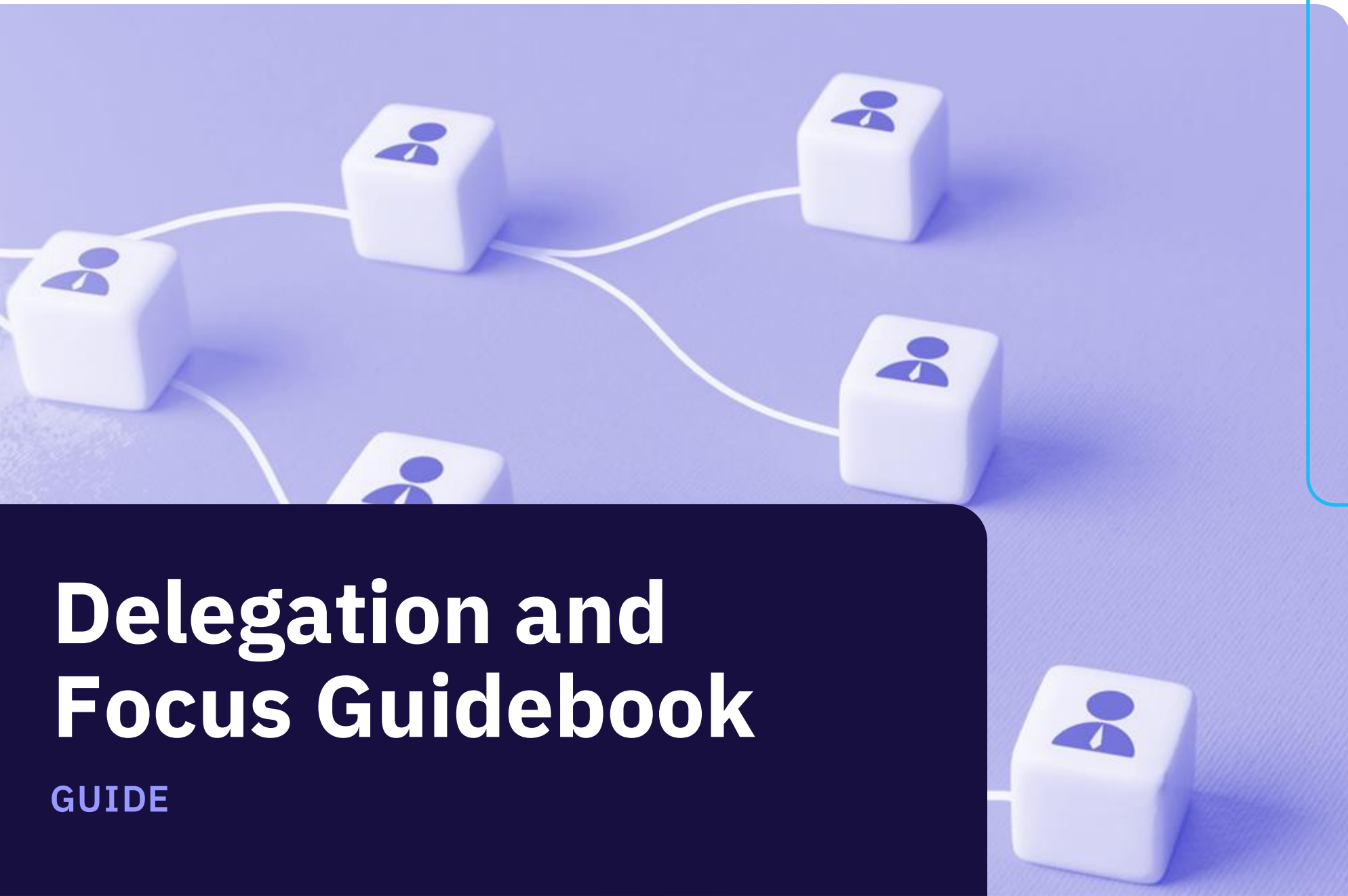




Delegation and Focus Guidebook

GUIDE

Delegation Plan

Successful managers and leaders know how to amplify the impact of their teams by effectively delegating tasks to their employees.

Succeeding at delegation frees up more time to pursue higher value activities, develop your team, create new processes and approaches to solving problems, and build a winning team culture.

Delegating tasks can be a daunting experience for many leaders. It opens questions like, “What should I delegate? To whom? How?”

This guidebook is a step-by-step approach to creating an effective delegation plan. It will help you:

- Define your task list.
- Decide what to delegate.
- Define measurable goals.
- Create a delegation plan.
- Support your team to take ownership and grow in their role.

Tip



With the resources of this lesson, you will also find the Task and Delegation Plan Template that accompanies this guide. You can use it to identify tasks, assign an action, and build a delegation plan.



Step 1: Define Your Task List

To understand what you need to delegate, you'll first need to map all the activities you currently have on your plate.

Let's say you are a manager in a small organization. You might be responsible for a variety of tasks.

- Onboarding a new team member into a junior role
- Organizing a team day at the end of the quarter
- Sending a weekly internal newsletter
- Holding one-to-ones
- Reviewing a contract renewal
- Ordering a birthday gift for a team member

As a manager there are few tasks you should never delegate.

- Explaining the vision and goals of the organization
- Recruiting and building a team
- Growth talks and performance appraisals
- Disciplinary issues

*Record your tasks in the Task and Delegation Plan Template. From this list, identify those things that **have to be done by you** as no one else has the expertise or skill to do them. Ask yourself: "If I am doing this task what more impactful thing am I not doing"*

THINGS OTHERS COULD DO	THINGS I SHOULD BE THE ONE TO DO
Onboarding our new team member	Holding team one-to-ones
Organizing the team day	Contract renewal
Sending a weekly newsletter	Interviewing for a new team member
Arranging a birthday gift	End of quarter Growth Talks

Step 2: Decide What to Delegate

Deciding what to delegate is the single biggest obstacle in creating and maintaining a good delegation plan. The Eisenhower Matrix helps you define what tasks are urgent and important, which will in turn help you decide what tasks are critical, what to delegate, and what is just wasting your time.

The Eisenhower Matrix compares a task's importance to its urgency, creating four quadrants with a unique action step: DO, SCHEDULE, DELEGATE, DROP.

Important and urgent = DO: These are high-priority tasks with significant consequences if not completed by their clear deadline.

Important, not urgent = SCHEDULE: These are tasks that are important for longer term goals, but don't have an set or immediate deadline.

Urgent, not important = DELEGATE: These are time-sensitive activities that need to be done and are important to the organization but can be completed by anyone with the right expertise.

Not urgent, not important = DROP: These are tasks that don't add any measurable contribution or value. Ultimately, they are time-wasters that keep you busy, but they do not help you progress toward your goals.

		URGENT	NOT URGENT
IMPORTANT	NOT IMPORTANT	DO	SCHEDULE
		DELEGATE	DROP

Step 3: Defining SMART Goals

When delegating a task it's important to make sure it's clear to you and your delegate, and that they have the right tools, skills, and resources to complete the task. Defining them as SMART goals can help you with this.

TASK	SMART GOAL
Sending a weekly internal newsletter	Write and publish a 1,000 word article before 15:00 every Friday

Is it SPECIFIC?

Yes. We know we need to write and publish an article and how long it should be. Since this is a recurring task, the topic will change each week. If this was a one-time task, you would also specify the topic when defining your goal.

Is it MEASURABLE?

Yes. Each Friday at 15:01, we will know if the goal was achieved or not.

Is it AMBITIOUS ?

Yes. In this instance, 1,000 words a week is ambitious enough.

Is it REALISTIC?

Yes. Again, this would be on you to decide, but we believe in you!

Is it TIME-BOUND?

Yes. We have an exact deadline.



Step 4: Create a Delegation Plan

By now, you have created a list of all your activities, identified the activities you wish to delegate, and defined a SMART goal for each. If that is the case, you are ready to create a delegation plan.

Your delegation plan should contain the following:

- The task or project you are delegating.
- The SMART goal you defined.
- The person to whom you are delegating.
- A deadline.
- A support strategy.

For the two tasks you will delegate, define your support plan.

TASK/ PROJECT	SMART GOAL	WHO	DEADLINE	SUPPORT STRATEGY
Sending a weekly internal newsletter	Write and publish a 1,000 word article before 15:00 every Friday	Manuela	Every Friday before 15:00	Show, check

The **support strategy** is the most critical element in your delegation plan. It shows the actions you need to take to enable your team to perform the delegated task. The strategy will depend on the nature of the delegated tasks and the delegate's personality and skill set.

SUPPORT STRATEGY	DESCRIPTION
Show	Teach the person how to perform a task by showing them how it is done and giving them an example to practice with your supervision.
Coach	Hold periodic discussions on how the delegate thinks the task should be done.
Connect	The person has the skills, competencies, and understanding of how to perform the task but lacks contact with stakeholders who can support them. Connect them to the right people in the organization.
Check	Review what the person did and confirm that it is aligned with the agreed expectations.
Prepare	Help them develop in a specific area (for example, time management skills).
Motivate	Recognize their efforts.

Using These Tools as a Team

So far, we have covered how you can use these tools to prioritize and delegate your own tasks. The real power of these tools is in using them as a team! This aligns everyone to priorities, gives ownership, and promotes inclusive decision-making, which drives morale and productivity. Add this as a recurring activity to your team meeting.

Using these tools as a team, you will follow the same steps.

1 Define and prioritize your group's task list.

EXAMPLE

- ▲ Address a technical issue that's delaying active sales (Abigail)
- ▲ Contact affected clients to offer support (Abigail)
- Prepare for next month's sales pipeline review (Greg)
- Update the CRM database with new client details (Manuela)
- Perfect internal sales report formatting (Manuela)
- ◆ Prepare slides for upcoming presentation (Jane)

Tip

It can be helpful to assign each team member a color to help with differentiating tasks on the Eisenhower matrix at a glance.



Using These Tools as a Team

2 Team members plot their tasks on the matrix in the appropriate bucket.

Depending on your team, it can be useful to rename the “Delegate” bucket to “Help” since team members may not have anyone to delegate to.

In team meetings, give one or two minutes to each team member to give a high-level summary of their tasks ahead and allow them the opportunity to ask for or offer assistance to their colleagues.

3 Set SMART goals and create a plan as a group.

	URGENT	NOT URGENT
IMPORTANT	▲ Address a technical issue that’s delaying active sales ■ Update the CRM database with new client details	● Prepare for next months sales pipeline review
NOT IMPORTANT	▲ Contact affected clients to offer support ◆ Prepare slides for upcoming presentation	■ Perfect internal sales report formatting



Wrap Up

It's important to remember that delegating isn't a goal to be achieved but rather a skill and mindset to develop. It takes continuous effort and improvement over time.

What are your biggest challenges when it comes to effective delegation skills? Share your thoughts and examples in the community.

