



# Delegating: When, How, and To Whom?

**BEEN THERE, DONE THAT ~ THINGS I'VE ALREADY DELEGATED/TO WHOM/WHY:**

**Task**

**To Whom:**

**Why?**

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_____	_____	_____
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***What's the Big Deal? Why Delegating is Important***

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***So.....Why Aren't We Better at Delegating?***

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What is **MY** biggest obstacle?

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## TAKING IT TO THE NEXT LEVEL

### *WHAT SHOULD WE BE LOOKING AT? ~ 9 INGREDIENTS IN RICETWICE*

We sometimes delegate tasks/projects without understanding or explaining all the aspects of the assignment. Use this checklist to cover everything when delegating to your team members.

**R** \_\_\_\_\_ : What is available to them?

**I** \_\_\_\_\_ : Include all details, data, etc.

**C** \_\_\_\_\_ : Set a clear deadline

**E** \_\_\_\_\_ : Outcomes and results you expect

**T** \_\_\_\_\_ : What talent do they bring to the project?

**W** \_\_\_\_\_ : Why is the task important?

**I** \_\_\_\_\_ : Get their feedback; check for understanding

**C** \_\_\_\_\_ : Schedule times to touch base

**E** \_\_\_\_\_ : How far does their authority go? What needs prior approval? By whom?

*Which of the above areas should I pay more attention to?* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## **Key Points to Consider**

- \_\_\_\_\_ Is the team member knowledgeable?
- \_\_\_\_\_ What skills and abilities does the team member bring?
- \_\_\_\_\_ What special talents do they have that will fit this project?
- \_\_\_\_\_ What is their level of experience?
- \_\_\_\_\_ Will the team member's personality be a good fit for this project?
- \_\_\_\_\_ How motivated would this team member be to participate?
- \_\_\_\_\_ What are your organization's needs?
- \_\_\_\_\_ What is the team member's current workload?
- \_\_\_\_\_ What would the impact be on other team members?
- \_\_\_\_\_ What are the risks of delegating this particular task?
- \_\_\_\_\_ What are the needs of this team member?
- \_\_\_\_\_ If others will be involved, what personal influence does the team member have?
- \_\_\_\_\_ Does the team member have the communication skills needed?
- \_\_\_\_\_ Do they need to be detail-oriented?
- \_\_\_\_\_ Will this assignment help the team member grow?

### **A BIRD'S EYE VIEW**



#### **FIRST THINGS FIRST...**

- 1) \_\_\_\_\_ assignments, decisions, and other work.
- 2) Decide which tasks can be \_\_\_\_\_.
- 3) \_\_\_\_\_ your staff and decide who could best handle each assignment.
- 4) \_\_\_\_\_ the assignment.
- 5) \_\_\_\_\_ the delegation.

#### **AND REMEMBER....**

- 1) Delegate \_\_\_\_\_, \_\_\_\_\_

fully; don't be a \_\_\_\_\_.

2) Give \_\_\_\_\_.

3) Put assignments in \_\_\_\_\_, including deadlines.

4) Encourage \_\_\_\_\_.

5) Show \_\_\_\_\_ and \_\_\_\_\_.

6) Be open to \_\_\_\_\_.

7) Accept \_\_\_\_\_.

8) \_\_\_\_\_.

### **IT'S MY CHOICE!**

*What is one task I've decided I could delegate? Why?*

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*What might I consider when I delegate this task?*

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*To whom might I delegate this particular task? Why?*

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*What is one "key" I've discovered at today's session?*

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*How can I use this information to become a better delegator?*

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