

A Useful Guide to Delegating



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ISBN 978-1-906460-13-6

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 **Pansophix**

A Useful Guide to Delegating

Published by Pansophix Online
22 Torquay Road, Chelmsford,
Essex, CM1 6NF, England

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This edition published January 2009 (a)

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ISBN 978-1-906460-13-6

Contents

About this guide.....	3
Section One – What's it all about?.....	5
A definition.....	5
Where are you now?	6
Benefits of delegation (and some barriers!).....	8
Section Two – Do or delegate?	12
Deciding WHAT to delegate	12
Section Three – Putting it into practice.....	17
WHO should you delegate to?	17
HOW to delegate effectively – the 7 Step Approach.....	19
Section Four – Summary	22
About the Author.....	24
Appendix A.....	25
Prioritising Tasks	25
Appendix B.....	26
Delegation Planner.....	26
Appendix C.....	27
The Seven Step Checklist.....	27

You can download A Useful Guide to Delegating Toolkit from ...

<http://www.pansophix.com/resources/a-useful-guide-to-delegating-toolkit.zip>

The toolkit contains MS Word versions of the tools in the Appendices. The toolkit is a ZIP file which can be opened using WinZip or similar software.

About this guide

Delegation is one of the essential skills of management. Used effectively it can enable you to manage your time more effectively, focusing your time and attention where it is most needed, at the same time as developing the capability of your team members.

Like many managers you may find, at least some of the time, that you have too much to do. It is also common to find yourself bogged down in work which is time-consuming but not always pivotal to your job. At the same time your team members may feel that they do not get enough opportunity to develop the skills that they need to progress. *Effective* delegation offers a solution to both of these issues and can improve the performance of your team.

In this guide you'll find down to earth, practical guidance on how to delegate effectively so that you achieve the benefits and avoid the pitfalls. You will also find some challenges to help you integrate the learning from each section. You are strongly encouraged to work through these as you go along, as this will help you to apply the learning more effectively to your own situation.

Section One – What's it all about?

A definition

Most managers know delegation is important – but what exactly is it?

One definition is:

“giving someone else the responsibility and authority to act on your behalf”.

So – if you ask the clerical assistant in your department to do some photocopying for you, that isn't delegation. You're simply **ALLOCATING** a task which is part of their job role. They are not acting on your behalf.

Delegation usually means giving someone a task which is not an intrinsic part of their job description. In doing this, you are giving them **RESPONSIBILITY** for doing something, or making something happen, much as you normally do in your job. To enable them to do this, you must give them the **AUTHORITY** to do so – this might be as simple as letting other people involved know that they are taking on the responsibility for that task, or it may be more formal – such as making them an authorised signatory to approve invoices for payment.

For example, if you ask a member of your team to collect data from a number of other departments and collate it for inclusion in a report you are preparing for the senior management team, that is delegation. You are giving them responsibility for carrying out the task and they may need authority to get the information. The task is one which you might have done yourself, rather than one which is an intrinsic part of their job.

When you delegate, it is important to remember that you remain **ACCOUNTABLE** for the outcome. So if the person you delegated to doesn't have the skills to carry out the task, or misunderstood what was required, then you will be accountable. This is perhaps what sometimes deters people from delegating. However, by taking a systematic approach the risk of an unfavourable outcome can be minimised.

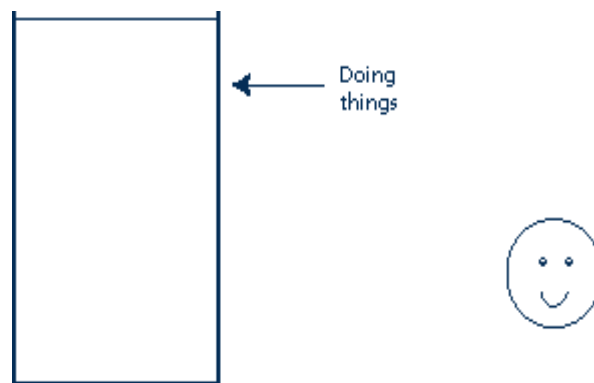
As you work through this guide you will learn the key points you should consider in order to delegate effectively.

Where are you now?

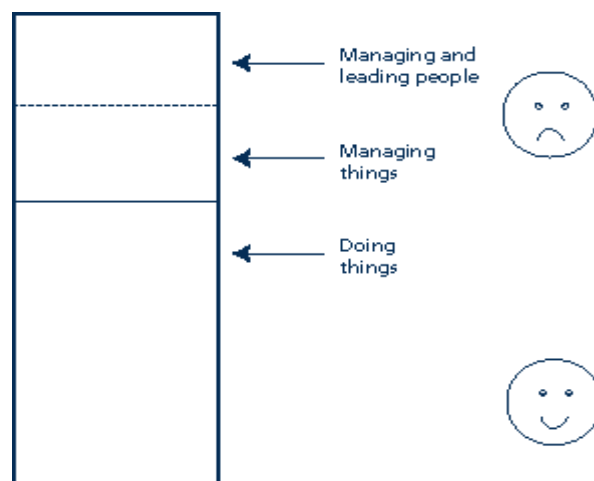
The fact that you're reading this guide means you probably think you could be delegating more effectively. But take a few minutes to think about how much you do delegate and how it could change your management style.

If you're fairly new to the management role, it's worth thinking about what happens when you make that transition.

As a manager your job can be split into three parts – doing things, managing things, and managing and leading people. You probably chose the line of work you are in because you liked doing those things – building, selling, teaching, etc. – not because you wanted to be a manager. Managers are often chosen because they are good at the things they do, so naturally, if you are good at your job then doing that will give you a high degree of job satisfaction and enhance your self esteem.



When you take on a management role, different demands are placed on you. And in contrast to the things you do well, these demands may seem complex and difficult at first.



The amount of time you spend doing things should reduce to allow you time for managing.

However, if you continue to do the things you do well, then you're likely to find you don't have time for the parts of the job that take you out of your comfort zone – managing things (like information, budgets, facilities) and managing and leading people.

If you're to succeed as a manager, you have to shift the balance and, to do that, you have to stop doing some of the things you're good at and enjoy and learn to manage things and people more effectively.

And that means developing your delegating skills.

Challenge One

First, consider these questions about your current approach to management ...

1. If a team member needs to speak with you can you usually find time for them straight away or at least the same day?
2. Do you ever feel envious of your staff or other colleagues who leave work on time, while you work late or take work home with you?
3. Do you have regular one to ones with your team members to monitor their progress and discuss any potential problems before they become serious?
4. Do one to ones and appraisals regularly get postponed because you're too busy trying to meet deadlines?
5. If you're away from the workplace unexpectedly for a few days, can your team "hold the fort" without too much trouble?
6. If you're away from the workplace, are you constantly on the phone to your team members answering questions, or checking up on what's happening?

If you answered "yes" to most of the odd numbered questions then it seems you're doing a pretty good job of managing rather than doing. If you answered yes to most of the even numbered questions, then it seems like you're still doing things at the expense of managing.

By delegating more, you can actually be a much better manager and support your team more effectively. For a more in depth assessment of your delegation skills complete our [online delegation questionnaire](#). This will ask you to think about how you would deal with a number of different scenarios which can be indicative of how prepared you are to delegate. You will get feedback on your responses and a summary of your results, which you can use to identify your own personal development objectives.

Benefits of delegation (and some barriers!)

Delegation doesn't just benefit the manager who is delegating – it can have very positive effects for the team member and the wider organisation. Some of the key benefits are:

- Helps reduce pressure on your time.
- Allows you to allocate time to tasks which only you can do.
- Tasks are completed more quickly.
- Decision making can be improved - team members who are closer to the work often know more about the detail.
- It allows individual team members to develop their skills.
- The overall skill mix of the team is therefore improved, reducing reliance on yourself.
- A more flexible, highly skilled team, can offer a better service.

So – why doesn't it always happen? Some of the perceived disadvantages of delegating are:

- Managers fear that quality will be compromised if they don't do a task themselves.
- The time taken to brief and support someone to whom a task has been delegated is seen as unproductive, and often more time than it would take to do the task itself.

Sometimes managers feel threatened by relinquishing control of tasks. There may even be a concern that the staff member may be able to complete the task better than they would themselves!

A Case Study

Here's an example from my own experience of how delegating effectively paid huge dividends for me, the team, and the organisation.

I was a manager of team of trainers in a railway engineering company. I had no engineering experience. There were some tasks which were clearly part of my job description, such as analysing training needs of the different disciplines and developing the training plan to address them. Now it would have been hugely onerous task to do that myself – especially with my level of inexperience – I tried and realised it wasn't going to work. So, as part of the appraisal process, I agreed with the more senior trainers that they would take responsibility for part of the training needs analysis and training plan according to their area of specialist experience and interest. We discussed how they would go about this and agreed realistic timescales. The trainers who weren't directly involved in this exercise helped by providing cover for the ones who were.

The benefit for me was that they had the technical discussions with managers and fed back to me the information I needed in a form that was meaningful to me, so the task was done better than I could have done it myself. It also saved me a considerable amount of time – what would have been a large task for one person, was manageable when shared between three or four who had the skills relevant to their part of the task. I had a clear idea of what the business needed and the resources I needed to secure for us to provide it. I could concentrate my efforts on that and on managing the delivery of the training.

The benefits to the team were that they felt respected and valued for their knowledge and experience. There was also a stronger sense of ownership about the work of the department as a whole. There had been some minor friction and rivalry between the different disciplines, which gave way to more mutual respect and increased team working, drawing on each other's specialist skills and knowledge. They also knew that if they had a problem, I was nearly always able to spend time discussing it with them promptly because I wasn't busy "doing things".

The organisation benefited from timely delivery of training aligned to its needs. Managers knew they had a point of contact in the training department who "spoke their language" so we could be responsive to changes in demand. The reputation of the department improved greatly, leading to more improvements in morale for the team. Because the team collectively had a good understanding of what we were doing and why, if operational problems arose in my absence

(for example, a trainer going sick) they could come up with a solution which meant minimum disruption to the service.

A highly motivated, informed and empowered team is always going to provide a better service than a disenchanted group of individuals with a burnt-out manager!

Delegation isn't something extra that you have to do as a manager – it is part of the whole process of motivating and developing people, building a team, and giving your customers what they need. Take a look at the [online presentation](#) to see how you can use delegation as a tool for developing skills and growing capacity in your team.

Challenge Two

Before you move on, take some time to think about your previous experiences of delegating – whether as a manager/team leader delegating a task, or as a team member having a task delegated to you.

- Which experiences had positive outcomes?
 - What worked well?
 - What were the benefits?
 - Which of these benefits would you like to achieve more of now?
- Were some experiences less positive?
 - What didn't work?
 - What were the consequences?
 - What could have been done differently?

If you don't have any experience of delegating yet, then ask your line manager or a colleague for some examples from their experience, to give you some insight from a manager's perspective.

Even if you haven't delegated before, reviewing your own experiences of being delegated to will help you start to identify some of the factors that can make delegation effective or ineffective. We'll go on to explore these more as you work through the guide.

In this section, we've looked at the reasons WHY you should delegate. In the following sections we'll look at WHAT to delegate, to WHOM, and HOW.

Section Two – Do or delegate?

Deciding WHAT to delegate

If you delegate inappropriately it can be counter productive, and it is sometimes the experience of this that deters managers from delegating more. You have probably heard of, or experienced, the scenario where a stressed manager starts “delegating” tasks on Friday afternoon which have to be completed for a deadline on Monday morning. Is it motivational? No! Is it developmental? It’s unlikely to be, if the manager doesn’t have time to discuss the task with the person doing it. Does it achieve a quality outcome? Again, with inadequate briefing it’s unlikely. This style of management isn’t delegation – it’s dumping!

Another situation which may arise is when managers delegate the task well in advance of the deadline, but fail to give clear guidance about what is required and don’t agree any interim follow up dates. They then become nervous that the task isn’t being done the way they would have liked, so they constantly check up on the individual. If the task isn’t being done their way, they begin to criticise and micro-manage. The person doing the task becomes demoralised and this shows in their work. The manager eventually takes the task back and complains that delegating is a waste of time and it’s quicker to do things yourself!

PLEASE UNDERSTAND NOW that delegation IS NOT a quick fix to solve all your time management problems! Nor is it an emergency measure to start using only when you realise you cannot do everything yourself. It is an investment which can offer long term dividends. Investment means that you have to put something in first, before you get a return, and that is your time. Time to plan what you will delegate, to whom you will delegate it, and how you will go about it.

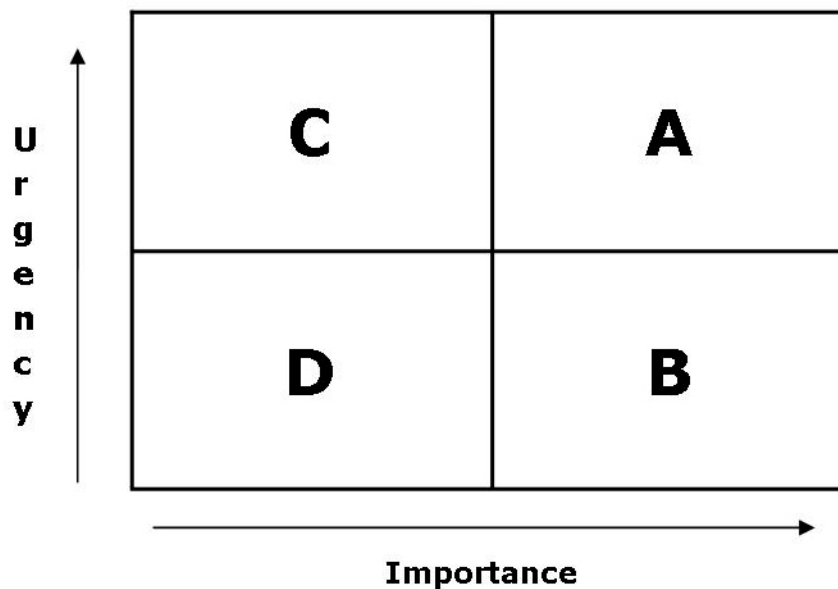
So first we will look at how you decide what to delegate.

In broad terms – work you delegate should be:

- Non-supervisory work (for example you would not delegate responsibility for dealing with a performance issue or a grievance).
- Tasks which recur or use transferable skills – this means that team members will have a chance to continue to develop their skills in this task, and you can anticipate a return on the initial investment of your time.

- Tasks of lower priority – allowing you more time for the high priority tasks.
- Some of the nicer tasks, as well as the less interesting but necessary ones!

One way of prioritising tasks, is to use the urgency/importance grid:



For our purposes – “Importance” means tasks which ...

- have a high relevance to the key purpose of your job role
- are an explicit part of your job description
- relate to your current objectives as agreed with your line manager.

If you are not clear about which tasks are most important to your role, have a conversation with your line manager about it. It can help to understand the relevance of some of your work in the context of the wider organisation. It may be that you are taking on some tasks which could potentially be given to someone else, since they are important to the organisation but not important to your role. Understanding importance is critical to being able to prioritise effectively.

“Urgent” – means the task needs to be completed within a short timescale. If you are not clear about timescales for some tasks on your to-do list, then again

you should discuss this with your manager. Some deadlines may be negotiable, or it may be that the work can be completed in stages, making it more manageable.

So we can classify our tasks as follows ...

- Tasks in quadrant A (important and urgent) – you need to do!
- Tasks in quadrant B (important but not yet urgent) – plan time for, either to do or delegate.
- Tasks in quadrant C (urgent but not important) – delegate to a member of staff who can complete with minimal supervision.
- Tasks in quadrant D (not urgent or important) – first, question why you are considering doing this task at all! But if it needs to be done, delegate.

In reality, many managers only ever do tasks when they are in quadrant A or C – when they become urgent. If you often feel like you are “fire-fighting” then you know what this is like! You will constantly feel under pressure, and it is likely that the quality of your work is sometimes compromised. It becomes a hard cycle to break out of, because tasks that are important now, will usually become important and urgent eventually, but may be much more difficult to deal with by then.

For example – conducting appraisals for your team members is important, but it may not be perceived as urgent (especially if you have a lot of other A tasks). But over the longer term you may find yourself dealing with dissatisfaction among the team – complaints about lack of development, grievances, staff leaving – which may be related directly or indirectly to neglecting this important part of your role.

As your first step to delegating, look down your to-do list, and transfer the tasks from it onto the grid (there is a blank template in Appendix A and in the toolkit). If you haven't already done so, you may wish to discuss this with your line manager to check that your understanding of the relative importance of tasks is the same as his or hers.

Now consider which tasks you could delegate. Your aim, if possible, is to deal with tasks before they become urgent and important; though on occasions some demands are made at short notice which are urgent and important from the start!.

Think about the frequency with which tasks arise – if a task is very much a “one-off” and none of your team already have the skills to take it on, then you may consider that the time you invest in supporting them to carry out the task is unlikely to have long term benefits. However, tasks which need to be done frequently or which develop transferable skills are worth delegating. Over the longer term you will be able to delegate these tasks with minimal support, thus building up the skill levels of your team members.

On a practical note, it is worth looking for some of the simpler tasks that a member of your team could do without much support from you. Starting to delegate these tasks will free up some of your time, so you can then provide the support which is needed to delegate more complex tasks.

Challenge Three

Look at your prioritised task list and identify which tasks could be delegated to members of your team.

What would the benefits be for them ...

- New skills?
- Better understanding of the work of the team as a whole?
- More variety in their work?

How could you use the time you ultimately save – more regular one to ones with team members? More time to spend on important tasks, before they become urgent? More time for your own development? Going home on time?

You can use this table to summarise your ideas.

Task	Team member	Benefits for them	Benefits for me

Think of all the tasks you *could* delegate. You don't *have to* delegate them at this stage, but it will help you to see the options available to you.

A good idea to help you to measure your progress is to set targets for increasing the amount of work you delegate. You may want to highlight tasks, in the above table, in different colours indicating, for example, that you will start delegating them this month, within three months, or within six to twelve months. Start with the tasks which team members can take on with minimal support, and work up to more complex tasks which offer real development opportunities for them and which will ultimately free up significant time for you.

In this section we've looked at how you identify which tasks you could delegate, and the benefits you and your team members could get from this. It is important to take into account the competency level of the person to whom you intend to delegate, and we'll look at this some more in the next section.

Section Three – Putting it into practice

WHO should you delegate to?

The short answer is – to the right person for the task. This may be ...

- Someone with the necessary skills and knowledge for the task.
- Someone who has time to do it.
- Someone who is paid less. It makes sense for tasks to be undertaken at the most economic level.
- Someone who will benefit from training in the task or who needs to gain more experience at it.

Your team members are all individuals – they have different knowledge, skills, and experience. Their levels of confidence and enthusiasm in relation to different tasks will vary so you need to take this into account. Also consider the urgency and importance of the task:

D tasks – not important or urgent

These may be suitable to help people develop some skills or experience, without undue pressure. Of course, the nature of the task may be so simple that it is not very developmental, in which case you may want to consider the most economic use of time. It is more cost effective to delegate the collation and distribution of a report to a more junior member of staff than to do it yourself or give to a senior member of your team.

C tasks – urgent but not important

These tasks need to be delegated to someone who has the necessary skills and knowledge to complete it quickly without much support. The more you delegate, the more your team members will be able to support you by taking on these tasks. With these tasks, it is sometimes useful to accept that “good enough” really is good enough! A less experienced member of your team might not do the task to the standard that you would, but if that task is not important, their standard might be acceptable.

B tasks – important but not urgent

These tasks can be delegated to someone who already has the necessary competence, or as a development opportunity. In the latter case, make sure you plan in sufficient time for you to support them adequately. Developing your

team members' skills to be able to take on these tasks is a worthwhile investment for you and for them. For you – it can ease the pressure when faced with a high volume of work which is “important”. For them – they are developing skills and experience which can help them progress in their career.

A tasks – important and urgent

Most of the time you will want to take responsibility for completing these tasks yourself. However – do consider what the task involves. For example, you may get a demand for information which is important and urgent. It may not necessarily be difficult to meet this demand – just time consuming. If this is the case, consider if there is someone on your team who can carry out the task as well (or maybe better!) than you.

You may have developed the skills of one or more of your team members by delegating “B” tasks – in which case, they may be capable of carrying out the task to tight deadline. If asking them to do this, make sure you both review their workload and delegate some of their tasks appropriately if necessary. If the task is one which requires your input – then do it. However – it may help to review your other work and see what you can delegate to free up time.

Good delegation can be very motivational for the individual and plays a big part in fostering team spirit – encouraging people to feel involved in supporting the team to achieve its shared goals. However, to capitalise on some of these benefits it is useful to keep these points in mind ...

- If there are some less interesting tasks which need to be delegated, don't always ask the same person to do them. They may not mind at first, but might well become resentful. Discuss and agree at team meetings how you can share these tasks.
- Recognise individual achievement – delegating work is not likely to have a motivational effect if you then take credit for the completed work yourself!
- Recognise team working – one team member may have successfully completed an important piece of work, and you'll want to give them credit for that. But remember to also acknowledge other team members who may have taken on other tasks to enable him or her to do it.

In Appendix B you will find a template for a planning sheet you can use to decide which tasks you can delegate, to which team member and why. You don't have to delegate everything, but you may find it useful to think about what could be delegated and how that might benefit your team members and yourself.

HOW to delegate effectively – the 7 Step Approach

The following seven steps will help you to ensure that you delegate effectively, so that you and your team member can enjoy the benefits.

Firstly you must provide the person you are delegating to with:

1. Reasons

- Why is the task being delegated?
- Why to that person?
- Why is the task important?

2. Results

- What specifically must be achieved? With very simple tasks explain this plainly and directly. With more complex tasks the details of what is to be done and how, to what standards etc should come from a dialogue between you and the person who will be doing the work.

3. Resources

- Does the person need any additional knowledge or skills?
- Whose help can he or she call upon?
- What equipment can he or she use?
- How much money can be spent?

4. Deadlines

- When must the task be finished?

At this point, you need to ask for ...

5. Feedback

- Has the person you are delegating to fully understood what you've told them?
- Does he or she have any questions or want to clarify anything?

Finally, you must provide ...

6. Controls

- Except with very simple tasks check progress periodically. Set interim follow-up dates by which identified progress should have been made. Giving prior warning and then meeting to discuss progress in an open, friendly and helpful manner will ensure this is not seen as interference or mistrust. If there are problems, this should allow you time to address them before the ultimate deadline is missed.

7. Support

- You need to tell other people that the task has been delegated. This legitimises the authority given to the person doing it. And that person needs to know where to turn for support in a crisis.

If you follow these steps, you should find that your team members are clear about what is expected and are equipped to complete the task successfully. This develops their confidence and competence, and allows you to allocate your time to the tasks which you don't delegate.

Let's take an example ...

Imagine I need to produce a report on utilisation of training resources in my department – I have to supply information about trainer activity, classroom and practical area usage and levels of attendance on courses. Most of the data can be extracted from the training administration system, but the standard reports are not set up to produce the exact statistics I've been asked for. Also, we took over a new site part way through the year and their manual records have not yet been input to our system. I'm busy conducting interviews for the next couple of days, and the information is needed by the end of the week. I decide to delegate the task of collating the information to Sam, the training administrator.

Step one: Reasons

I sit down with Sam and explain what's needed. I'm busy over the next few days, and so I'm delegating part of the task to her because I know she understands the system, and is always methodical and accurate when working with figures. It will also help her understanding of how the data she inputs to the system is used by the wider organisation. The task is important because it will influence the resources that are available to us in future! I check how she feels about taking on the task, and she is keen but wants to know more about what she needs to do.

Step two: Results

I explain what information is required and why. We discuss how this can be obtained and agree a spreadsheet format which Sam will use to record the information.

Step three: Resources

Sam is a bit concerned about one of the calculations which is needed. I show her how to set up the formula. She takes notes and also saves the template spreadsheet so it is ready for her to use. We also agree that while I am out of the office Sam can work at my desk so that she is less likely to be interrupted. I

will speak with the office manager to arrange for someone else on the team to take Sam's calls for the day.

Step four: Deadlines

I need to complete my report by the end of the week, so we agree that Sam will produce the information I need to do that by Thursday lunchtime. Sam agrees this is achievable, especially if someone else can cover her calls for a day.

Step five: Feedback

We have had a two way discussion throughout our meeting, but I still check if Sam has any other questions or concerns. She would like to be sure that she is producing the information in the right format so we move on to ...

Step six: Controls

She will email her work to me at the end of the first day, so I can check that it is correct. That way, if there is a problem, we can deal with it and still have time for her to complete the task.

Step seven: Support

I tell Sam to leave me a message if there is a problem and I will call her back between interviews. As agreed, I speak with the office manager and the rest of the administration team to arrange cover for Sam. I thank them, and Sam, for their help and again explain the importance of the task.

If you're not used to a structured approach to delegation, you might find the blank template at Appendix C of this guide useful to prepare yourself for delegating a task to one of your team members.

Challenge Four

Now it's time to put what you've learned into practice!

Using the seven step format, prepare yourself to delegate a task to a member of your team. Think about how long you will need to allow for this – if it's a simple task it may be a few minutes. For a more complex or developmental task you may need to allow several hours, possibly over a number of days. Make sure you communicate the benefits, and allow time for questions or clarification. Before briefing your team member, ask your manager to go through your plan with you and invite feedback. And when you're ready – do it!

Section Four – Summary

You may, of course, review the content at any time, but here's a quick summary of what you will have learned by working through this guide.

- Delegation is a crucial management skill which allows you to allocate your time more effectively between doing and managing.
- Delegation offers benefits including ...
 - More effective use of management time.
 - Better team working.
 - Skills development for team members.
 - Improved service to your customers.
- Delegating effectively requires an investment of your time in the short term for long term benefits.
- Prioritising your tasks according to their urgency and importance is an important first step in deciding what to delegate.
- Before you start to delegate tasks consider the skills, knowledge and development needs of your team members compared to the requirements of the task and the time you have available to support them.
- Remember to give credit to team members who complete delegated tasks, and also to recognise the importance of support from other team members.
- Use the seven step approach when delegating a task. Remember to communicate your reasons for delegating that task to that individual, and to discuss the benefits for them. Encourage feedback and questions for them so that you both have a clear understanding of what is required and what resources and support will be available.

It is useful to set yourself targets for the tasks you will delegate, and how you will use the time this frees up for you. Make sure you monitor your progress and recognise your achievement.

Challenge Five

An important measure of your success is the impact on your team members. You can invite them to give confidential feedback by using our online questionnaire. [Click here for details of how to do this.](#)

Encouraging feedback is an important part of creating a learning environment, and their responses will help you to identify any areas in which you can develop further.

Good luck and happy delegating!

Susan Kaer.

About the Author

Susan has been involved in the design, delivery and management of training and development since 1988 and has worked with organisations in the public, private and charity sectors.

She is a Chartered Member of the Chartered Institute of Personnel and Development, a Member of the Institute of Leadership and Management and a Member of the International Stress Management Association.

Susan works on a freelance basis in and around Suffolk. Much of her recent work addresses the relationships between management style and interpersonal skills and workplace stress, and involves helping organisations develop their training plans and strategies, as well as designing and delivering workshops.

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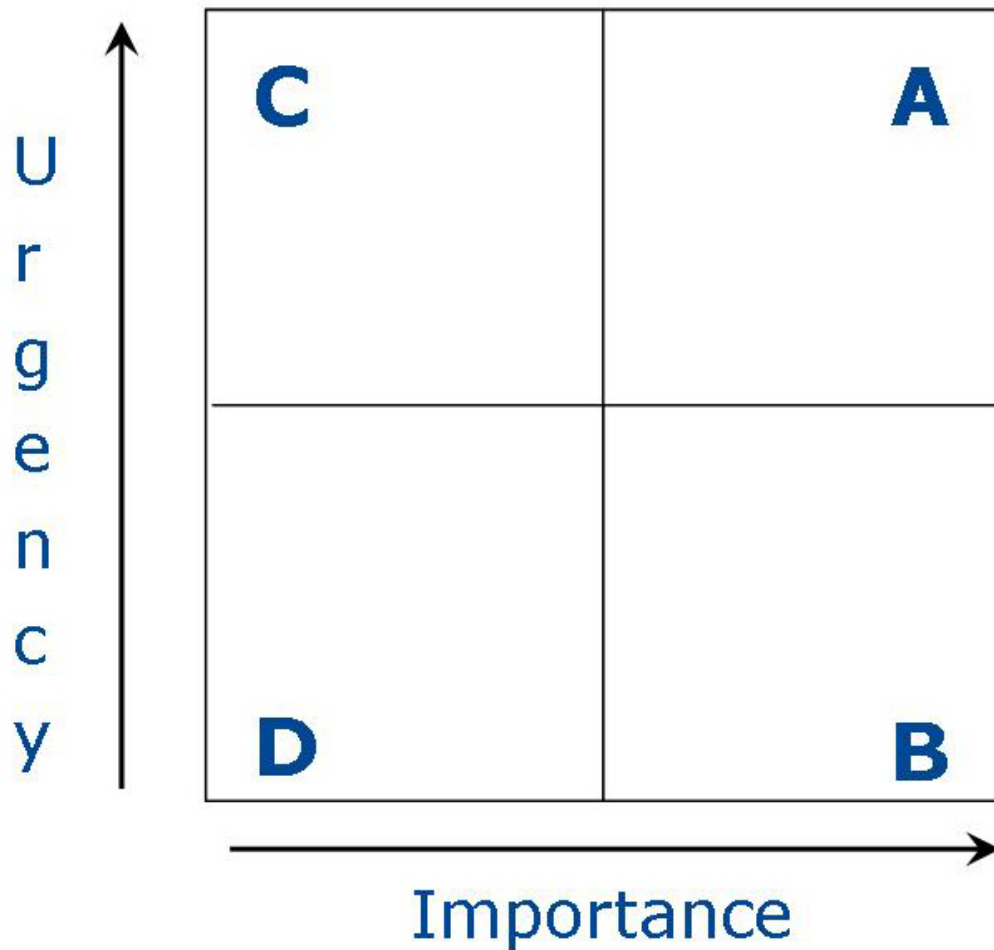
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Appendix A

Prioritising Tasks



Appendix B

Delegation Planner

Task	Team Member	Reason (e.g. already competent, development, has time, expressed interest etc)

Appendix C

The Seven Step Checklist

7 Steps	Details		Tick when done
Reasons	Why is the task being delegated? Why to that person? Why is the task important?		
Results	What specifically must be achieved?		
Resources	Skills? Equipment? People? Time?		
Deadlines	When must the task be finished?		
Feedback	Does the person you are delegating to understand what is required? Does he or she want to ask anything?		
Controls	Agree interim follow up dates.		
Support	Have you given the appropriate authority? Who can help if there is a problem?		