

A 15-Item Delegation Checklist to Get the Results You Want

*Turn Disasters and Disappointments into
Mission Accomplished!*

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15-Item Delegation Checklist

Delegation Checklist: Deciding to Delegate

- Will delegating this project free you to do more important work that **ONLY** you can do?
- Will delegating this task to someone more qualified result in a better final product?
- Do you have access to a qualified person to complete the project?

Delegation Checklist: Steps in the Process

- Define the project** clearly in your own mind first.
- Select the right person** for the project—consider skills, expertise, experience, commitment, workload.
- Overview the project:** Start with the goal. What's the overall mission or the results you want the person to accomplish?
- State the exact deliverable you expect.** Do you have in mind an event? A report? A briefing? Only a slide deck? An informal meeting with data analysis? A software modification?

15-Item Delegation Checklist

- Be clear about the due date and budget.** Mention any flexibility. If you don't have a definite budget, can you provide a range as a guideline?
- Let them know what resources might be available:** Other people to help? Information elsewhere? Templates? Similar projects in the past? Extra budget to access? Mentors?
- State any specific processes, policies, or procedures you expect them to follow** in getting the work done. Don't make the project part of a guessing game.
- Mention any precautions** they should take along the way to prevent problems you foresee.
- Monitor progress:** Do you want periodic progress reports? Will you get in touch with the person if you want updates or do you expect them to get in touch with you only if they run into delays or other problems?
- Follow up** to make sure the project is completed successfully.
- Evaluate and provide feedback.**
- Record a "this-is-how-I-did-it" note to the file** (if the project was a "first"). This after-the-fact record will make the next similar project much quicker and easier to complete. Ask the individual to record their process, including recommendations to avoid problems in the future (for example: suppliers used, prices negotiated, unusual time required for certain steps).

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business relationships with tips from
Dianna Booher's latest book!

Communicate Like A Leader
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