

**Delegation Plan**

**Task:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Step 1: Set Clear Expectations (5Ws + H)**

When delegating, cover these points with your team member.

**What**

*Define the task and expected outcome (be specific)*

**Why**

*Explain why it matters and how it connects to the bigger picture*

**Who**

*Confirm ownership — one accountable person*

**When**

*Set clear deadlines and any milestones*

**Where**

*Provide resources, tools or contacts needed*

**How**

*Clarify the standard required, boundaries, critical process*

## Step 2: Agree on Support & Authority

Define the level of authority being delegated.

- Recommend only (manager decides)
- Decide within boundaries (manager approves exceptions)
- Full ownership (team member decides and delivers)

## Step 3: Follow Up & Review

Plan your follow up sessions.

### Set dates and times

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Use these questions during review.

### What worked well?

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### What was challenging?

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## What can be improved next time?

### Golden Rules of Delegation

- Be clear, not vague.
- Delegate outcomes, not just activities.
- Balance accountability with support.
- Close the loop with feedback and recognition.