

# 5-STEP FRAMEWORK FOR EFFECTIVE DELEGATION

Delegation allows managers to achieve results and to focus on the high-value aspects of a project. However, it can be a difficult task to master without the proper structure in place.

Use this framework to establish your strategic plan to ensure your team has the necessary information and resources to accomplish their goals.

## **1. Define the purpose:**

What's your team's compelling purpose?

What's the vision for your team?

Why is it important?

## **2. Establish your goals:**

Break down the vision into goals.

What are the specialized tasks that need to be accomplished to achieve the goal?

What is the end goal?

**3. Determine the roles:**

Who is best suited for each task?

**Name:**

**Task:**

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Does each person have the necessary skill set, resources, and technology to achieve the desired task objective?    **yes**    **no**

If no, consider the next two questions.

Could this be a growth opportunity for someone? If so, whom?

**Name:**

**Opportunity:**

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If the person doesn't have all the skills, could they learn them through training?

**Name:**

**Training Suggested:**

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**4. Ensure accountability:**

Is each team member accountable for their goals?    **yes**    **no**

How can you make sure they know how the task is important to the vision of the team?

What's their starring role?

Name:

Starring Role:

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**5. Set timeline/milestones:**

Set reasonable, agreed-upon milestones with team members.

**Example for Single Individual**

Name:

Milestone:

Date:

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What is the overall timeline for the project?

Are the objectives and directions clear enough for team members to understand and take action?

**yes   no**

What might they need to get the task completed?

**Name:**

**Needs:**

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How often and at what milestones will you check in on their progress?

**Milestone:**

**Check-In Date:**

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