LEAD & SCALE

DELEGATION WORKSHEET

Transfer responsibility with clarity, authority, support, and accountability.

2026 EDITION | PRACTICAL BUSINESS RESOURCE

01 / DELEGATION CONTEXT

Define Why Responsibility Is Moving

Delegation should improve leadership focus, develop capability, strengthen ownership, or increase capacity. Clarify the purpose before selecting the person or process.

Delegation decision	Definition
Responsibility / result	
Current owner	
Proposed owner	
Reason for delegation	
Business or customer importance	
Target transfer date	
Executive sponsor / manager	
Review period	
Primary success measure	
Known constraint or risk	

What should become possible after this responsibility is delegated?

_____

_____

What must remain with the current leader?

_____

02 / DELEGATION INVENTORY

Identify What Should Be Delegated

Review recurring work, decisions, projects, relationships, and approvals. Delegate results and authority—not only low-value tasks.

Responsibility / task	Frequency	Value / impact	Leader-only?	Candidate owner	Decision
			Yes / No		Delegate / Develop / Retain / Stop
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- ☐ Retain work requiring unique executive authority, fiduciary duty, or sensitive judgment.
- ☐ Delegate work that develops capability and creates clear ownership.
- ☐ Automate, simplify, or stop work before assigning unnecessary complexity.
- ☐ Do not delegate unresolved ambiguity without defining the intended result.

03 / OWNER SELECTION

Choose the Right Person

Match responsibility with capability, capacity, judgment, motivation, authority, and development needs. Avoid delegating solely to the person who is always reliable.

Candidate	Relevant capability	Capacity	Judgment / trust	Development value	Support needed	Decision

Selection checks

- ☐ The proposed owner understands the customer and business context.
- ☐ The assignment is appropriately challenging—not reckless.
- ☐ Required authority, information, time, and resources can be provided.
- ☐ Competing priorities have been resolved.
- ☐ The person understands that ownership includes raising risks early.

04 / OUTCOME & STANDARDS

Define What Successful Ownership Means

State the required result, quality, timing, boundaries, evidence, and customer impact. Leave room for the owner to choose an appropriate method.

Delegation element	Definition
Required outcome	
Customer / stakeholder served	
Completion evidence	
Quality standard	
Deadline / milestone dates	
Budget / resource boundary	
Policy / compliance boundary	
Dependencies / required inputs	
What must not change	
Definition of failure / escalation	

The result stated in one sentence

_____

_____

05 / AUTHORITY LEVELS

Transfer the Right Decision Authority

Specify which decisions the owner may make independently, which require consultation, and which require approval. Responsibility without authority is not delegation.

Decision / action	Decide independently	Consult first	Approval required	Not delegated
Work method and sequencing	☐	☐	☐	☐
Routine customer / stakeholder response	☐	☐	☐	☐
Use of approved budget	☐	☐	☐	☐
Selection of suppliers / tools	☐	☐	☐	☐
Changes to scope	☐	☐	☐	☐
Changes to timeline	☐	☐	☐	☐
Changes to quality standard	☐	☐	☐	☐
Staffing / resource requests	☐	☐	☐	☐
Policy or compliance exceptions	☐	☐	☐	☐
External commitments	☐	☐	☐	☐

Financial, contractual, legal, or reputational authority limit

_____

_____

Emergency authority and notification rule

_____

06 / KNOWLEDGE TRANSFER

Provide the Context and Tools Required

Transfer the information, relationships, process knowledge, history, systems, and judgment criteria necessary for responsible ownership.

Knowledge / resource	What must be transferred	Source / location	Owner	Due	Complete
Business and customer context					☐
Process / procedure					☐
Prior decisions / history					☐
Key relationships					☐
Systems / access					☐
Data / reports					☐
Templates / examples					☐
Policies / standards					☐
Supplier / partner information					☐
Known risks / exceptions					☐

- ☐ Access is granted before accountability begins.
- ☐ Sensitive information is handled under appropriate controls.
- ☐ Examples explain judgment without forcing imitation.
- ☐ The owner can locate the current source of truth.

07 / TRANSFER PLAN

Move from Learning to Full Ownership

Use staged delegation when capability, risk, or complexity requires it. Define what the owner will observe, practice, lead, and fully own.

Stage	Owner activity	Leader activity	Evidence to advance	Target date
1. Understand	Learn context, standards, and boundaries.	Explain, demonstrate, answer.		
2. Practice	Complete work with close review.	Observe and coach.		
3. Lead with review	Own work; consult at checkpoints.	Review evidence and decisions.		
4. Full ownership	Own result within authority.	Monitor outcomes, not method.		
5. Improve / teach	Strengthen system and develop others.	Support broader capability.		

Transfer milestones

Milestone	Owner	Due	Evidence
Access and briefing complete			
First supervised completion			
First independent decision			
Full ownership begins			
30-day ownership review			

08 / CHECKPOINTS

Create Accountability Without Micromanagement

Agree on the evidence, cadence, decisions, and escalation conditions that will keep the work aligned while preserving the owner’s autonomy.

Checkpoint	Purpose	Evidence / agenda	Owner	Date / cadence	Decision
Initial alignment					
Early progress review					
Milestone review 1					
Milestone review 2					
Pre-completion review					
Completion / acceptance					
30-day ownership review					

- ☐ Checkpoints are more frequent when risk or learning is high.
- ☐ The owner brings evidence, decisions, risks, and requested support.
- ☐ The leader avoids taking work back merely because the method differs.
- ☐ Escalation happens early enough to protect the result.

09 / SUPPORT & COACHING

Provide Help Without Reclaiming the Work

Define how the leader will coach, remove barriers, provide feedback, and protect authority. Support should increase ownership—not create dependency.

Support area	Need	Leader commitment	Other resource	Due / cadence
Context / judgment				
Technical skill				
Stakeholder access				
Decision coaching				
Priority protection				
Conflict resolution				
Budget / resources				
Feedback / quality review				
Confidence / development				

Coaching questions

- ☐ What outcome are you responsible for?
- ☐ What evidence supports your judgment?
- ☐ What options and tradeoffs have you considered?
- ☐ What decision can you make within your authority?
- ☐ What obstacle requires my help to remove?

10 / RISK & ESCALATION

Define When the Owner Must Raise an Issue

Make risk ownership explicit. Escalation is responsible leadership when an agreed threshold is crossed—not a failure of independence.

Risk / threshold	Early signal	Immediate action	Escalate to	Response time
Customer / service				
Financial / budget				
Schedule / milestone				
Quality				
People / capacity				
Legal / compliance				
Security / privacy				
Reputation / external commitment				

Situation in which work should stop immediately

_____

_____

Backup owner or continuity plan

_____

11 / REVIEW & DEVELOPMENT

Evaluate the Result and Strengthen Capability

Review outcomes, evidence, judgment, communication, ownership, and learning. Separate the quality of the result from whether the owner used the leader’s preferred method.

Review dimension	Expected standard	Evidence / result	Rating	Development action
Outcome achieved				
Quality				
Timeliness				
Use of authority				
Judgment / decisions				
Communication				
Risk escalation				
Stakeholder experience				
Process improvement				
Ownership / reliability				

Ownership decision

Decision	Selection / notes
Continue full ownership	
Expand authority	
Continue with support	
Return to staged development	
Reassign responsibility	

12 / REFERENCE NOTES

Use Guidance

Use the worksheet for recurring responsibilities, decisions, relationships, and significant projects. Revisit authority and checkpoints as capability and trust grow.

Recommended working sequence

Step	Working action
01	Define why the responsibility should move and what the leader retains.
02	Select the owner based on capability, capacity, judgment, and development.
03	Clarify the outcome, standards, boundaries, authority, and escalation rules.
04	Transfer context, access, relationships, tools, and current information.
05	Use staged ownership when risk or learning requires it.
06	Review evidence at agreed checkpoints without controlling the method.
07	Evaluate results, develop capability, and expand authority responsibly.

Final delegation quality check

- ☐ The delegated result is clear and measurable.
- ☐ The owner has the capability, capacity, information, and authority required.
- ☐ Decision boundaries and escalation thresholds are explicit.
- ☐ Knowledge, access, and relationships are transferred.
- ☐ Checkpoints protect outcomes without micromanaging.
- ☐ The leader removes obstacles without reclaiming ownership.
- ☐ The review strengthens both performance and future capability.

Important: This worksheet provides general leadership and management guidance. Confirm employment, legal, privacy, financial, safety, regulatory, contractual, and other requirements for delegated responsibilities.

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