TEMPLATE 13

Delegating a Task

PURPOSE: *Prepare and run a delegation conversation that hands over a task with its purpose, the outcome you expect, the authority they have, the support they can count on, and how you will check in.*

Delegated to: *Enter name*	**Manager:** *Enter name*	**Date:** *MM/DD/YYYY*	**Task:** *Short name*

THE TASK AND THE WHY

The task	*Clear description of what needs to be done*
Why this task matters	*Purpose and impact*
Connection to team/company goals	
Connection to their development	*If relevant: what they will learn or demonstrate*

THE OUTCOME — WHAT SUCCESS LOOKS LIKE

Success criterion 1	
Success criterion 2	
Success criterion 3	

CONTEXT — BACKGROUND THEY NEED TO KNOW

Context point 1	*History, politics, prior attempts, who cares about this*
Context point 2	

AUTHORITY & CONSTRAINTS

You have authority to	*Decisions they can make without asking*
Please check with me before	*Escalation points*
Budget/resources	*Limits and what is available to spend*

TIMELINE

Start date	*MM/DD/YYYY*
Key milestones	*Dates and what is due at each*
Due date	*MM/DD/YYYY*

SUPPORT AND CHECK-INS

Resources available	*People, tools, documents, budget*
How I'll support you	*What you will do, not just what you will be available for*
Frequency and format of updates	*e.g., 10 minutes in the weekly one-on-one, plus a written note at each milestone*
When/how to escalate issues	*What should reach you immediately, and by what channel*

QUESTIONS

Do you feel set up for success? What else do you need?

> **Pro Tip:** Give them space to ask questions and clarify before you leave the room. Delegation without the authority and context to act is not delegation; it is assigning blame in advance.