

Delegation & Empowerment — Workbook

This workbook accompanies the Delegation & Empowerment course and gives you a structured space to apply every framework to your real team and workload. Work through each section after completing the corresponding module. By the end, you will have a completed task audit, a team strengths map, outcome brief templates, and a 90-day delegation action plan ready to use tomorrow.

The Case for Delegation

Audit your current workload to find delegation opportunities and calculate the real cost of holding on to tasks.

Exercise: The R-D-W Task Audit

List every recurring task you own. Label each one: R = only you can do this, D = you are doing it but someone else could, W = you should have delegated this already. Then answer the reflection prompts.

- What percentage of your tasks landed in D or W? What surprised you?
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- Which single D or W task, if delegated this week, would have the biggest positive impact on your available time?
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- What fear or assumption has kept you holding on to your highest-priority W task?
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Worksheet: Impact-Effort Delegation Matrix

For each recurring task in your D and W buckets, estimate its strategic impact (1=low, 3=high) and the level of unique skill only you possess (1=low, 3=high). Use the scores to rank your top 5 delegation candidates.

Task name

Strategic impact score (1-3)

Unique-skill required score (1-3)

FIRM score (0-4 — count yes answers)

Delegation priority rank

Potential team member to receive it

Checklist: Delegation Readiness Checklist

- I have completed the R-D-W audit for at least one full week of tasks
- I can name my top 3 delegation candidates from the impact-effort matrix
- I have identified the primary blocker that has prevented me from delegating each candidate
- I have asked each direct report what skill they most want to develop this quarter

I have noted which delegation candidates could serve as development opportunities for a team member

Matching Tasks to People

Build your team strengths map and practise diagnosing development level before your next delegation assignment.

Worksheet: Team Strengths Map

For each team member, rate their capability in the task categories listed below: 3 = demonstrated strength, 2 = adequate, 1 = developing. Add any task categories specific to your team. Update this table every quarter.

Team member name

Data analysis / reporting (1-3)

Written communication (1-3)

Stakeholder management (1-3)

Process design / documentation (1-3)

Creative problem-solving (1-3)

Project coordination (1-3)

Current total weekly hours capacity

Development goal (from 1:1)

Exercise: Development Level Diagnosis Practice

Think of a task you plan to delegate in the next 14 days. Run through the four-step development level assessment for the person you are considering. Record your findings and choose a Delegation Dial position.

• What is the specific task, and who is the candidate? What development level (D1–D4) do you assess them at for this task, and what evidence supports that assessment?

• Which Delegation Dial position (1–5) is appropriate given their development level and the task's risk level? Write out the exact sentence you will use to communicate your dial position.

• What is the escalation trigger you will specify — the specific condition that should cause them to pause and come to you?

Checklist: Before-You-Delegate Checklist

I have assessed the person's development level (D1-D4) for this specific task

I have chosen an explicit Delegation Dial position and can state it in one sentence

The person's current workload has capacity for this task

This task aligns with at least one of their stated development goals OR fills a genuine team capability gap

I have not chosen this person simply because they are the most available

Writing Clear Outcome Briefs

Draft a complete outcome brief for your next delegation and practise converting vague task descriptions into crisp outcome statements.

Exercise: Outcome Statement Rewriting Practice

Take three tasks from your delegation candidate list and rewrite each task description as an outcome statement using SMART-O. Lead with the end state, include a measurable indicator, and specify a deadline.

- Write your before (task) and after (outcome) for all three tasks. Read them aloud — does the after version tell someone what done looks like without needing to ask you?

- For your strongest outcome statement: what is the one quality indicator you included, and how would the person self-assess against it without checking with you?

- Which component of SMART-O was hardest to write (Specific, Measurable, Achievable, Relevant, Time-bound, Outcome-first)? What does that difficulty tell you about the task itself?

Worksheet: Outcome Brief Builder

Complete this brief for your highest-priority delegation candidate. Use it as the written handoff document when you assign the task.

Task / project name

Outcome statement (SMART-O — what does done look like?)

Success criterion 1 (quantitative indicator)

Success criterion 2 (qualitative indicator)

In scope (list what is included)

Out of scope (list what is explicitly excluded)

Constraints (budget, tools, timeline, non-negotiables)

Authority level — decisions they own alone

Authority level — decisions that require your input

Escalation trigger (specific condition to pause and contact you)

Delegation Dial position (1-5) and the sentence you will say

Milestone check-in date

Weekly status signal format and day

Checklist: Outcome Brief Quality Check

-] The outcome statement describes the end state, not the activity
-] There is at least one measurable success criterion
-] Scope boundaries are explicit (in AND out of scope)
-] The authority level specifies which decisions they own vs. which need my input
-] The escalation trigger is concrete — a specific condition, not a vague instruction to use judgement
-] The check-in rhythm is designed and communicated at handoff, not reactively later
-] The brief is written, not purely verbal

Following Through Without Micromanaging

Design your check-in system, practise your completion debrief questions, and commit to your 90-day delegation habit.

Worksheet: Delegation Log

Use this log to track all active and completed delegations. Review it monthly to identify patterns in who you delegate to, which tasks you keep, and how often your dial positions match the person's development level.

Date delegated

Task / project name

Team member

Development level at assignment (D1-D4)

Dial position (1-5)

Outcome brief written? (Y/N)

Check-in rhythm agreed? (Y/N)

Status signal (Green / Amber / Red)

Completion date

Outcome achieved? (Y/N/Partial)

Completion debrief completed? (Y/N)

Notes for next time

Exercise: Completion Debrief Rehearsal

Think of a delegation you completed recently (or imagine one you are planning). Write out your answers to the three completion debrief questions as if you are the team member — then write what you, as the manager, would do with each answer.

- What went well that you want to repeat? As manager: how will you reinforce this in the next delegation?

- What would you do differently? As manager: what would you change in how you briefed or supported this task?

- What support from me would have made this easier? As manager: this is your direct feedback — what system change does it suggest?

Checklist: 30-60-90 Day Delegation Milestones

- Day 30: Completed the R-D-W task audit for a full work week
- Day 30: Identified top 5 delegation candidates using the impact-effort matrix
- Day 30: Updated team strengths map with 1:1 development goal data
- Day 60: Delegated at least 3 tasks with written outcome briefs
- Day 60: Designed check-in rhythms for all active delegations and honoured them
- Day 60: Completed at least one RACI for a multi-person task
- Day 90: Conducted completion debriefs on all delegated tasks
- Day 90: Updated team strengths map based on observed performance
- Day 90: Reviewed delegation log for patterns and adjusted future dial positions accordingly
- Day 90: Calculated new R-D-W ratio and compared to Day 30 baseline

Your Action Plan

1. This week: Complete the R-D-W task audit for every task you own
2. This week: Identify your top 3 delegation candidates using the FIRM criteria and impact-effort matrix
3. Week 2: Conduct a 1:1 with each direct report to ask about their top development goal for the next 90 days; update your team strengths map
4. Week 2: Choose your highest-priority delegation candidate, assess their development level (D1-D4), and select a Delegation Dial position
5. Week 3: Write a complete outcome brief for your first delegated task using the Outcome Brief Builder worksheet
6. Week 3: Delegate the task with an explicit dial-position statement and a designed check-in rhythm
7. Week 4: Conduct the first milestone check-in; practise the green light rule — do not add extra check-ins if status is green
8. Week 6: Complete a RACI matrix for any delegation that involves three or more team members
9. Month 2: Conduct completion debriefs on your first three delegated tasks; review what you would change about your briefing process
10. Month 3: Review your delegation log for patterns; recalibrate dial positions based on observed development; set your next 90-day targets

