Delegation Worksheet

LEVANTE
BUSINESS GROUP

Status:	❏Draft ❏Training ❏Delegated ❏Reviewed ❏Delegation Completed
Task Name:	
Description: (short description of the task)	

Dates(s)	
Training:	❏Completed:
Transfer:	❏Completed:
Task Responsibilities	
Previous:	
Assigned To:	
Deliverables (the outputs of this task)	
Delivery:	

Why is this task important to the business?
Task Frequency
❏Daily ❏Weekly ❏Bi-Weekly ❏Monthly ❏Quarterly ❏Yearly ❏Other:
Training Materials (any training materials required for this task)

Task **Details** (the details or steps required to complete this task)

Delegation **Follow-Up Review**		
❶ Date:	❷ Date:	❸ Date:
❏No Issues ❏Issues	❏No Issues ❏Issues	❏No Issues ❏Issues

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Delegation Worksheet Instructions

This Delegation Worksheet is designed to help you effectively and efficiently delegate tasks within your business. Successful delegation requires clear communication. By communication (in writing) the details of the task being delegated, you significantly reduce misunderstandings and increase accountability. It may take a little longer initially to delegate a task using this technique, but it will result in greater success and less overall time spent having to explain it again or recovering from mistakes later.

Delegation is a process. It begins with a clear definition of the task to be delegated. After describing it, in writing, you will need to properly train the person or team assuming this task. After training for the task is completed, then the task is officially delegated. The process is not complete, however, without first conducting follow-up reviews to make sure the task is being executed correctly and efficiently.

Status – Indicates the status progress for this delegation. When you first complete this worksheet, check the "Draft" box. As you progress through the subsequent stages of the delegation process, check each box as applicable.

Task Name – Assign this task or project a name so that you can easily refer to and identify it.

Description – Provide a brief description of the task. You may also want to refer to a supporting document or link for more detailed information or background on the task.

Date(s) – The training date(s) are when you conducted training or shared instructions on this task. The Transfer date is when you assigned this task to the person or team identified in the "Assigned To" box. Check the "Completed" box when you have finished these steps.

Why is this task important to the business? – A brief summary of why this particular task is important to your business. What does it impact? Who cares about this and what decisions or other tasks are dependent upon it?

Task Responsibilities – Who has been responsible for this task (Previous) and to whom will it be delegated (Assigned To). The "Assigned To" is the one person who is ultimately responsible for this delegated task.

Task Frequency – If this is a regularly occurring task, identify the frequency. If the frequency depends on another event or task, then check the "Other" box and explain.

Deliverables – What are the outputs from this task? What is produced when this task is completed? Use the "Delivery" field to specify when the outputs are due and how they are to be distributed.

Training Materials – What materials are required to help train the person assuming this task? These can be links to documents or other resources.

Task Details – These are the details, or steps, required to complete this task. This is where you define how this task is performed and completed. You may want to attach additional details as required, or include links to more detailed documents or resources.

Delegation Follow-Up Review – It's important to follow-up and validate that the task was effectively delegated and is being performed as expected. Use this section to document this follow-up.