Considerations when delegating

Set up a face-to-face meeting with the team member to whom you are delegating

- Whenever possible, delegation is best initiated in person.
- A critical component of the delegation process is the interaction between you and the team member to whom you are delegating.
- Throughout the discussion, and again before concluding the meeting, encourage the team member to ask questions to gain clarification on what they are being asked to do.

Clearly describe the task being assigned

- Define the purpose of the task and discuss how it fits into the big picture: why is this task being performed?
- Discuss in detail how to perform the task. If the team member is unsure how to complete the task, walk through one instance of the task with them so they can observe what needs to be done and how to do it.
- Provide any necessary background information needed to get the team member started.

Discuss expected deliverables

- Discuss and agree on what the expected deliverable is. It might be a specific answer on an issue from personnel or performance and documentation of a procedure. If the task involves specific documentation requirements, discuss these requirements and make sure the team member is clear on your expectations for the documentation.

Discuss timing expectations

- Provide the amount of time the team member is expected to spend on the task and the corresponding timeline for completion.
- If known at the time, provide the team member with the date you and others (such as a manager or partner) are expecting to review the documentation related to the task.

Discuss resources that are needed

- Discuss any materials such as documentation templates, engagement files or schedules that are needed to complete the task.
- Identify the personnel who will need to be involved in order to complete the task.

Agree on a schedule for on-the-job coaching, follow-up and feedback

- Discuss the need for on-the-job coaching during the performance of the task – how much coaching will be needed and who will provide it? (This could be you or another team member.) Discuss how the team member will let you know if they require assistance or have questions.
- Establish a system for reporting progress on a regular basis, such as daily or weekly status updates.