

Skillbook

Delegation Skills

Team Management
Skills



Mindtools

Delegation Skills

Skillbook

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1. Introduction

Do you regularly struggle to complete everything on your To-Do List? Or do you find it difficult to off-load tasks, because you feel that you have to do everything yourself? If so, it might be time to brush up on your delegation skills!

It can be scary to “let go” of your work at first, but doing so can benefit both you and your team. You’ll likely have more time to spend on high-priority tasks, while your team members will be given new opportunities to enhance their skills and take on new responsibilities.

In this **Skillbook**, we’ll explore:

- Why delegation is critical for effective performance.
- Which tasks you should delegate.
- Who you should delegate to.
- How to develop and use a delegation plan.

By the end of this Skillbook, you’ll be able to confidently delegate many of your routine tasks. This should free up valuable time that you can spend on the high-level tasks that only you can do. The result will be an increase in both your and your team’s productivity and performance.

2. Overcoming the Difficulties of Delegation

Delegation is an integral part of successful business. But the reality is that many people are reluctant to do it.

There are two key reasons why people are hesitant about delegating tasks to others:

1. They believe that they are the only ones who can do the job right.
2. It often takes upfront effort. For instance, providing training, guidance and feedback can often take longer than doing the job yourself.

However, when you don't delegate, you risk becoming overloaded with work that you have little hope of completing on time, leading you to feel stressed or burnt out.

Delegating may require additional work and effort, but it will likely deliver long-term benefits.

First, it will free up time that you can spend on high-level and high-priority tasks that only you can do. Second, meaningfully involving your people in new projects can help to develop their skills and experience.

So, once you've decided that delegation **is** worth the effort, you'll need a plan of action for deciding what to delegate, and to whom. Follow the steps in this Skillbook session, and you'll gain the ability and confidence to delegate effectively and efficiently.

3. Deciding What to Delegate

The first step toward successful delegation is deciding what tasks to delegate. Once you have done this, it will be much easier to decide who to delegate them to.

There are some tasks that you will be unable to delegate because they require your expertise and judgment. For example, you can't ask someone else to discipline one of your team members for his or her lateness, as much as you'd like to. You can't ask him to select new team members. And, you can't ask him to make a key presentation to the board.

But, you could ask someone else to write your weekly sales report, or draft your monthly newsletter to customers.

What Can You Delegate?

To decide what you can and can't delegate, you first have to analyze the tasks that you perform routinely. A good place to start is with your job description, or with past To-Do Lists.

Action:



Think about the tasks you complete in a typical day, and record them in the "Tasks" column of the Delegation Log on the next page. Estimate the amount of time you spend on each one, and write this in the "Time Spent" column.

Tip:



If you have time, record every task that you complete for a two-week period. Then add these to your Delegation Log.

Delegation Log

Tasks	Time Spent	Delegate		
		All	Some	None

Print off as many copies as you need.

Once you've identified all of your routine, daily tasks, you can start to think about the high-level and high-priority tasks that you are responsible for. This might include brand strategy or product development, for example.



Action:

Think about the key contributions that you make to your organization. Write the five most important ones in the box, below. These will include activities that are of the highest value and priority, and are therefore the ones that you should avoid delegating.

Key Contributions	
1.	
2.	
3.	
4.	
5.	

Once you've listed all of your routine tasks in the Delegation Log, you can think about what ones can be done by someone else.

Generally, these tasks will include:

- **Routine administrative tasks.** Regular reports, paperwork, claims sheets, or data gathering.
- **Standardized decisions and tasks.** Tasks that have well-defined rules and parameters.

There are four key factors to consider when you are deciding what tasks to delegate:

1. **Availability.** Is there someone available to do the task? Do they have (or can they be given) the information or training to carry it out successfully?
2. **Time.** If training is required, do you have the time to provide it? You will also have to factor in time to review their work.
3. **Opportunity for growth.** If you have a task that you feel would benefit one of your team members in terms of their goals or aspirations, then you should consider giving it to them.
4. **Priority.** High-profile tasks that need to be completed quickly and/or with little risk of error are often best kept under your control. These types of tasks may include strategic planning, recruitment of new team members, handling confidential information, or managing sensitive customer relationships.



Action:

Go back through the list of tasks in your Delegation Log and decide which tasks you can delegate. Then, tick the box to show how much of each task you want to delegate:

- **All** – you hand over all authority to complete the task.
- **Some** – you retain some authority for the task, but you put someone else in charge of the bulk of the work.
- **None** – you are the only one who should be in control of the task.



Tip:

Remember, you're still responsible for the outcome of tasks that you delegate. Make sure that you take the time to regularly check the progress of delegated tasks. This will allow you to take alternative action if needed.

4. To Whom Should You Delegate?

Now that you're clear about what tasks you can delegate, you can decide who to assign them to. This requires careful consideration of your team member's suitability for a task.

For example, if you delegate a task to someone who doesn't have the required knowledge, skill level or seniority, you may spend more time than you wanted providing them with additional guidance and support. At the same time, if you delegate too much to one person (even when you know they are capable), you risk overloading them.

In this chapter, we'll look at how you can overcome these risks by measuring a delegate's suitability for a task, taking into consideration these five criteria:

1. Organizational level.
2. Strengths and skills.
3. Development potential.
4. Current workload.
5. Reliability.

Use these criteria to delegate tasks in a way that plays to the strengths, expertise and interests of your team members.

Action:



Choose one task from your Delegation Log that you can delegate right away and write it in the table, on the next page.

Then, think about the skills and knowledge required to do the job. For example, does the delegate need to have specific computer skills, knowledge of certain procedures, or experience of dealing with clients? Write these down.

Next, think about the personal qualities and competencies that the delegate needs. For instance, do they need to have meticulous attention to detail, a charismatic personality, the ability to work well unsupervised, or an artistic eye? Write these down, too.

Task to Be Delegated:
Skills and Knowledge Required:
Personal Qualities and Competencies Required:

Delegate Suitability Assessment

When you've identified the skills and competencies that are required for each task in your Delegation Log, you can begin to match these tasks to the people who will most likely complete them successfully.



Action:

Think about the people who have the skills, knowledge and competencies to complete the task that you described in the first exercise. Then, record their names in the Delegate Suitability Assessment table, on the next page.

Delegate	Org. Level	Strengths and Skills	Development Potential	Current Workload	Reliability

Next, you need to assess each of the delegates that you listed above according to the five criteria identified earlier:

1. Organizational Level

You should aim to delegate tasks to the person who has the ability to carry them out, but who is also at the lowest level of seniority in your team. Doing this will ensure that you are delegating work to someone whose current workload will likely consist of relatively low-priority tasks. It also means that they will also have more time available to take on the tasks that you are delegating.

For example, if Jonas and Solomon are both capable of carrying out the task, but Jonas is a supervisor and Solomon is a junior, then Solomon will likely be the better choice. Jonas can then spend more time dealing with high-value tasks.



Action:

Go back to your Delegate Suitability Assessment and rate each delegate by their organizational level, using the scale below:

1. Management level.
2. Supervisor level.
3. Administrative/junior level.

2. Strengths and Skills

Try to match the tasks that you want to delegate with people's strengths. Also, think about their knowledge, skills and attitude.

If a team member doesn't have the required knowledge and skills, think about whether you have time to train them or the resources that they will need to carry out the work successfully.



Action:

Go back to your Delegate Suitability Assessment. Think about the strengths and skills that the delegate will require to complete the task. Then, rate each delegate who you have listed according to the scale below:

1. Poor match with strengths and skills.
2. Moderate match with strengths and skills.
3. Excellent match with strengths and skills.

3. Development Potential

Consider what benefits the delegate could gain by carrying out the task. For example, will it improve their knowledge and experience? Will it boost their job satisfaction, or could it help them achieve a personal or professional goal?

And try to accommodate the interests and ambitions of your team members.



Action:

Go back to your Delegate Suitability Assessment. Think about how well the task suits each delegate in terms of their development wants and needs using the scale below:

1. Poor fit with goals and interests.
2. Moderate fit with goals and interests.
3. Excellent fit with goals and interests.

4. Current Workload

Always consider the workload of the person to whom you are delegating. Also, avoid delegating to only one person, as this could overwhelm them.

Consider the “knock-on effect” that delegating a task can have on the rest of the team. You may need to reshuffle tasks or responsibilities within your team to be sure that workloads are still spread evenly.



Action:

Go back to your Delegate Suitability Assessment. Think about how busy each of the delegates who you have listed are, and then assess whether they can feasibly take on the task that you want to delegate using the rating scale below:

1. Does not have the capacity for more tasks.
2. Has capacity for some occasional tasks.
3. Has capacity for more regular tasks.

5. Reliability

The reality is that some people are just more reliable than others. Can a potential delegate be trusted to work independently and take ownership of the task? Or, do they lack confidence and require supervision?

If you are delegating a task that is urgent or high-priority, hand it over to someone who you know will do a good job. But, if it's a low-priority task, it might be worthwhile giving it to someone who is less experienced. You might need to spend a bit more time instructing them on what to do, but it will build up their confidence in the long run.



Action:

Go back to your Delegate Suitability Assessment. Assess how reliable each of your delegates are, using the rating scale below:

1. Low reliability.
2. Moderate reliability.
3. High reliability.

When you have completed the Delegate Suitability Assessment, you will be in a better position to make an informed decision about what to delegate and to whom. The more “3s” a potential delegate has, the more suitable they will be for the task.



Tip:

Where possible, delegate only to people who report directly to you. If you delegate a task to another manager's team member without getting their approval first, it puts everyone in a difficult position. Not only have you failed to keep them “in the loop,” but you will likely have caused confusion over who the team member should now report to.

If you do require input from someone who works outside of your team, always make sure you get the approval of their manager first.

5. Develop Your Delegation Plan

By now, you know what you want to delegate, and who you want to delegate it to. So, the next step is to develop a Delegation Plan.

In this chapter, we'll show you how to set up a Delegation Plan (see the worksheet on page 16) that will help you to clarify:

1. Details of the task.
2. Its objectives and deadlines.
3. Who's responsible for the task.
4. The delegate's level of authority.
5. Reporting on progress and follow-up.
6. The support and resources that will be provided.

1. Details of the Task

First, you need to clearly explain what the task is and why it needs to be done. This will give purpose to your team member and help them to make better decisions.

For example, you could say, "Jamil, I'd like you to mentor our new team member. They'll need a warm welcome to the team and to gain an understanding of our way of working. I know you'll do a great job because you're an excellent communicator, and have extensive knowledge of our team's responsibilities and objectives."

The statement tells Jamil **what** you want him to do (mentor a new team member) and **why** you want him to do it (because he has strong communication skills and a good understanding of the team's key activities).

Action:

Fill out the Task and Purpose/Context sections of the Delegation Worksheet on page 16. Specify what the task will involve and why it is important.



2. Objectives and Deadlines

The next step is to outline the task's objectives. Where possible, these should be measurable. For instance, if you want someone to take over the handling of incoming email queries, set them the specific goal of replying to messages received within one hour.

This will provide them with a clear objective and milestone that they need to reach in order to be successful, and will give them an overall sense of direction.

It can also be beneficial to gain them input when you set these goals. Unless they are inexperienced, get them to determine how they will achieve these goals, and make sure that they're happy with them. Otherwise, you may set goals or deadlines that they feel unable to reach, and this could result in incomplete work.

Tip:

If you dictate exactly what to do, when to do it and how to do it, you may also limit the learning potential that they could gain from taking on the task. This may also mean that you fail to take full advantage of their knowledge and experience.

Action:

Break your task down into specific goals, and record these in the "Goals" section of the Delegation Worksheet on page 16. Make sure that they are measurable, be specific about how to achieve them, and write down the business consequences of failing to meet them.

3. Who's Responsible for the Task?

The person who you are delegating to needs to know who to report back to on the progress of the task, or who to talk to if they encounter any problems. Clarify whether that will be you or someone else.

Action:

Fill in the "Responsible To" section on page 16 of your Delegation Worksheet.

4. The Delegate's Level of Authority

Next, decide how much authority you will give to the person to make decisions, as the ultimate accountability for the task lies with you. Consider the following:

- Do they have a set budget to work with?
- Can they assign work to others?
- Can they authorize overtime?
- When should they refer back to you or the person in charge? Do they need to get your permission before taking action? Or, can they take the initiative and report back to you afterwards?

Tip:

Try to avoid “upward delegation.” Don’t allow them to shift responsibility for the task back to you. Encourage them to come to you with possible solutions to choose from, instead of giving up and asking for help if they get stuck.

Action:

On the Delegation Worksheet on page 16, write down how much authority you will give to your delegate.

5. Reporting on Progress and Follow Up

Now you need to think about how you’re going to make sure that work is done well and on time.

Set out clear instructions to your team member about the reporting process, including the following:

1. How often they should update you (or their supervisor) on their progress.
2. How you want them to report back to you. For instance:
 - Do you want to know before they take a specific action?
 - Do you require a detailed written summary of what they’ve done, or will a short, verbal summary be enough?
 - Do you have a checklist that they need to complete?
 - Do you only want to know when something goes wrong?
 - Do you only want to know when they complete the task?
3. If you require regular reports from them, assign checkpoints. These might include points of progress or milestones that you need to know about.
4. Do you need advance notice from them to make sure that a required resource is in place?

Although it can be useful to provide reminders of upcoming checkpoints, try to avoid micromanaging them. Remember that a big part of successful delegation is letting go and putting your trust in your team members to take ownership of the tasks that you hand over to them.

Beware pitfalls like offering to do some of the work yourself, particularly if they come to you with a problem. They likely won't get everything right first time round, particularly if they are inexperienced, so don't expect perfection.

Instead, provide support, feedback and guidance where appropriate.



Action:

Fill in the “When to Refer Back,” “Reporting” and “Checkpoints” sections of the Delegation Worksheet.

6. Support and Resources

Make sure that you supply your team member with everything that they need to carry out the task effectively. This will include handing over and explaining any work that you've already done on the task.

You should also consider whether:

- They will need specialist expertise or support from another team member or department.
- They require training, and if so, who can organize or supply it.
- They need to be given access to a system or application that you use.
- Access to specialized equipment is needed.



Action:

Fill out the “Support” and “Resources” sections of the Delegation Worksheet.

Include details of any training or assistance from other personnel that they will require in the “Support” section. In the “Resources” section note down any specialized equipment that they will need.

Delegation Worksheet

Task (<i>what the task involves</i>):
Purpose/Context (<i>why the task is important</i>):
Completion Date:
Goals:
Responsible to:
Extent of Authority:
When to Refer Back:
Reporting:
Checkpoints:
Support Available:
Resources Available:

Feedback

Finally, it's vital that you set aside time to review delegated work thoroughly when it's handed back to you. If you get back work that doesn't meet the standards or objectives you initially set out, then check what went wrong. Was the person given enough time? Did they get the right level of support and resources? Would they benefit from further training?

Avoid accepting work that you're not satisfied with. If you do this, they won't learn how to carry out the task correctly, and you'll likely need to spend time re-doing it.

If you receive high-quality work, recognize and reward their effort by mentioning it in their performance review, sending them a "thank you" note, or highlighting their work in your next team briefing. Doing this will help to build up their confidence and self-efficacy.



6. Key Points

No one person can do everything. Successful managers often rely on delegation to complete large or complex projects.

Despite this, many people still struggle to delegate, or are reluctant to do so. But, it can be beneficial to both you and your team. It can prevent you from becoming overloaded and free up time for high-level tasks. Plus, it can offer your team members opportunities to take on more responsibility and to learn new skills.

In order to delegate successfully, you first need to identify what tasks you can hand over, and who to give them to.

You then need to provide clear and concise instructions to your team member about what the task will involve, as well as your expectations and the support that is available to them. Finally, it's essential that you take the time to review work that you delegate to ensure that it meets your expectations.

Although delegation takes some upfront effort at first, it can have a long-term positive impact on both you and your team. As you become more comfortable delegating work, you will likely find that both your and your team's performance, productivity and satisfaction will improve.