# Worksheet: Delegation Planner

*Streamlining Task Assignment*




Effective delegation is a key driver of productivity, accountability, and team growth. When work is planned and assigned clearly, leaders can focus on strategic priorities while team members take ownership of execution.

The Delegation Planner Worksheet is a practical tool designed to help managers and small business owners plan, assign, and track work systematically – ensuring the right tasks are delegated to the right people at the right time. When you dreamBIG, effective delegation allows your business to grow beyond what one person can manage alone.

**How to Use This Worksheet**

- Identify tasks that can and should be delegated
- Define clear outcomes and expectations for each task
- Assign ownership along with timelines and authority
- Track progress through regular check-ins
- Review outcomes and refine the delegation approach

Outlined below are the steps to plan and delegate work effectively using this worksheet

**Step 1: Task Identification**

List tasks that can be delegated to improve efficiency and focus. Use the following template to do so:

| Task / Activity | Category (Routine / Project / One-time) | Current Owner | Reason for Delegation | Priority |
|---|---|---|---|---|

**Step 2: Task Assignment & Planning**

Define ownership, timelines, and expectations clearly to avoid confusion or rework:

| Task | Assigned To | Expected Outcome | Deadline | Authority Level* | Support Required |
|---|---|---|---|---|---|

***Authority Level Definitions (Critical for Clarity)**

To ensure decision-making clarity, assign one of the following authority levels:

**Level 1: Act and Report**
Execute the task and inform the manager after completion.

**Level 2: Recommend then Act**
Propose a solution, align if needed, then execute.

**Level 3: Decide Independently**
Take full ownership and complete without prior approval.

Clear authority levels:

- Reduce micromanagement
- Prevent confusion
- Build confidence and decision-making ability

**Step 3: Delegation Clarity Checklist**

Before finalising delegation, ensure the following questions are answered:

☐ Is the objective clearly defined?

☐ Does the person have the required skills or training?

☐ Is the level of decision-making authority clear?

☐ Are timelines realistic?

☐ Is success criteria defined?

☐ Is support or guidance available if needed?

**Step 4: Delegation Tracking & Review**

Use this table during weekly or fortnightly check-ins to review progress and remove blockers.

| Task | Owner | Progress Status | Challenges / Blockers | Support Needed | Next Review Date |
|---|---|---|---|---|---|

**Step 5: Reverse Delegation Guardrail (Maintaining Accountability)**

Sometimes, team members may unintentionally "delegate upward" — bringing tasks back to the manager instead of resolving them independently. To maintain accountability and ownership, use the following guardrails:

When a team member approaches with a problem:

- Ask: *"What solution do you suggest?"*

- Clarify: *"What decision are you expecting from me?"*
- Redirect ownership: *"You own this task — what is your next step?"*
- Guide without taking back the task

Avoid:

- Immediately solving the problem yourself
- Taking ownership back unless necessary
- Allowing repeated escalation without learning

The goal is to support without absorbing the task back. Delegation succeeds when ownership stays with the assigned person.

**Step 6: Delegation Review & Learning**

Reflect on what worked and what can be improved to strengthen future delegation.

| Task | What Went Well | What Can Improve | Learning for Next Time |
|---|---|---|---|

**Why This Delegation Planner Works**

- Brings clarity to roles and responsibilities
- Improves productivity and focus
- Builds ownership and accountability
- Reduces micromanagement
- Develops team capability over time

**Summary**

Delegation is not about offloading work – it is about enabling others to succeed. This Delegation Planner Worksheet helps leaders plan work thoughtfully, assign it effectively, and follow through with clarity and consistency.

**deAsra Foundation is your 24/7 business companion.**

Access practical tools, expert insights, and ready-to-use resources designed for entrepreneurs under the



**dreamBIG**

**initiative to accelerate your business growth!**

Generated on : 29-September-2026