

Delegation Checklist

A. Before Deciding to Delegate

- ☐ The selected manager's current skills and growth needs are well-matched to the project.
- ☐ There is a strong likelihood of success with the right guidance and support.
- ☐ The project will give the manager meaningful preparation for greater future responsibility.
- ☐ Relevant stakeholders are informed, so the manager receives full support from others.

B. Communicating and Managing the Delegation

- ☐ Success is clearly defined in terms of outcomes, not steps.
- ☐ Consequences of success or failure are openly discussed to reinforce accountability.
- ☐ The boundaries for time, budget, and quality are explicit and agreed.
- ☐ Roles and responsibilities are clearly stated, including when and how support will be provided.
- ☐ Progress checkpoints are scheduled to provide structure without micromanagement.
- ☐ The manager is encouraged to take ownership of decisions within agreed limits.
- ☐ The leader remains available for coaching and problem-solving, without taking back control.
- ☐ Coaching conversations stay focused on learning, building confidence, and increasing capacity.
- ☐ Both leader and manager acknowledge that even with strong effort and preparation, setbacks can occur – and are part of the learning process.

C. After the Project is Completed

- ☐ An after-action discussion is completed jointly between the manager and the leader.
- ☐ The conversation addresses both project results and personal development outcomes.
- ☐ The manager articulates what worked well, where improvements could have been made, and what was learned.
- ☐ The leader shares observations on the manager's growth and readiness for future responsibilities.
- ☐ The leader's feedback maintains a constructive ratio of at least three positive points to one corrective point.

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