

Delegation Decision Matrix

What to Delegate, When to Delegate, and Who Should Do It

Great leaders don't do everything themselves - they multiply their impact through delegation. Use this framework to decide **what** to delegate, **when** to delegate it, and **who** should handle it.

Step 1: What Should You Delegate?

Use this decision tree to evaluate each task:

Ask Yourself...	If YES...	If NO...
Is this task repetitive or routine?	→ DELEGATE IT	→ Continue to next question
Could someone else do this with training?	→ DELEGATE IT (and train them)	→ Continue to next question
Does this help someone grow their skills?	→ DELEGATE IT (development opportunity)	→ Continue to next question
Is this the best use of MY time?	→ Keep it (for now)	→ DELEGATE IT

Categories: What to Delegate vs. Keep

DELEGATE THESE

- Routine administrative tasks
- Data entry and reporting
- Scheduling and coordination
- Research and information gathering
- Repetitive processes
- Tasks below your skill level
- Work that develops others

KEEP THESE

- Vision and strategy setting
- High-stakes decisions
- Performance reviews
- Hiring and firing
- Confidential/sensitive matters
- Crisis management
- Building key relationships

Step 2: Who Should You Delegate To?

Match the task to the right person based on these criteria:

Consider...	Best Fit...
Skill Level	Does this person have the skills or can they learn them quickly?
Current Workload	Do they have capacity, or will this overwhelm them?
Development Goals	Does this task align with their career growth?
Interest & Motivation	Will they be engaged by this work?
Reliability	Can you trust them to follow through?
Autonomy Level	How much direction will they need?

Step 3: How to Delegate Effectively

Use this 5-step process for successful delegation:

- 1. Set Clear Expectations** - What needs to be done, why it matters, and what success looks like
- 2. Provide Context** - Background information, constraints, and how this fits into the bigger picture
- 3. Define Authority Level** - What decisions can they make? When should they check in?
- 4. Agree on Timeline & Check-ins** - Deadline, milestones, and when you'll review progress
- 5. Offer Support** - What resources do they need? How can you help?

Delegation Script Template:

"I'd like you to handle [TASK]. Here's why it's important: [CONTEXT]. Success looks like [OUTCOME]. You have the authority to [DECISIONS THEY CAN MAKE], but check with me before [ESCALATION POINTS]. I need this completed by [DEADLINE], and let's check in on [MILESTONE DATE]. What questions do you have? What support do you need from me?"

Common Delegation Mistakes to Avoid

- X Micromanaging** - Hovering defeats the purpose. Trust, then verify.
- X Dumping** - Just handing off work without context or support sets them up to fail.
- X Reverse Delegation** - Don't let them give the task back to you. Coach them through it.

- x **Delegating Too Late** - Give them enough time to do it well, not just enough time to panic.
- x **Only Delegating Grunt Work** - Give them meaningful work that helps them grow.

Task Evaluation Worksheet

Use this to evaluate tasks you're currently doing and decide what to delegate:

Task	Time Spent	Could Delegate?	Who?	By When?