

Delegation Conversation Example

The following is an example you can use to help you map out your own delegation conversation using the template on the following page.

1. Set Up

Confirm the desired outcomes of your delegation conversation

"I'd like to take a few moments to present a new assignment that I'm confident you can do. The desired outcomes of this conversation are to have clarity around the big picture of this assignment and a shared understanding of what's expected so that we can move to next steps. Are you comfortable and prepared for that conversation today?"

Explain the big picture and impact of this task

"Each quarter, I develop a series of reports and insights for our Board of Directors. These reports help convey the revenue that our department is bringing into the organization and outlines key deliverables on deck in the quarter ahead."

2. Engage

Explain why this employee was selected

"I believe you are a great fit to take on this assignment because of the interest you shared with me before about sharpening your analytical and presentation skills. You have a good grasp of the importance of our work and also on our upcoming deliverables. This should be an exciting task and it will also give you more visibility into our senior leadership team and longer-term corporate strategy."

Describe the expectations and parameters of the task

"For this particular assignment, I pull together six different pieces of data. I have all these reports saved in an existing folder that I can show you. Once I pull these reports, I format them in a consistent way and add in some quick commentary to call out key trends. I also update a table which lists our key deliverables in the quarter ahead. You'll want to use existing Excel and PowerPoint templates and have this completed by the 10th business day of the new fiscal quarter. It generally takes me three hours each quarter to complete, but it may take you a little longer the first time. That's okay. Let me know if you need to re-prioritize any of your other tasks."

Provide resources and an open line of communication

"I'll be available next week to show you where these files exist and show you some historical examples. I'll have an open-door policy so you can come to me with any questions or concerns. I'll also be available to review any final documents. What questions do you have about this assignment?"

3. Complete

Acknowledge the summary of the agreements you've made:

"To ensure that we are on the same page, what are the next steps you'll take? Is there any particular support agreements you would like to propose?"

Review the next steps for this task:

"Okay, so let's outline and confirm the specific next step actions and due dates."

Looking to build greater delegation skills in your workforce? Consider [Managing with Impact](#), a flagship program designed for helping managers tackle three critical managerial conversations.

Preparing the Delegation Conversation

Using the sample conversation from the previous page, complete the following conversation planning template.

Desired Outcomes of the Conversation

What would you like to achieve in this conversation?

Big Picture and Impact of the Task

How does the topic of the conversation fit into the overall organizational context?

Expectations, Parameters and why they were selected

What are the guidelines for how the employee should go about the job?

Resources

What kind of support will the employee receive to do the job?

Communication

How will you track progress and stay in touch along the way?

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