DELEGATION GUIDE

CAREER VIGILANTES | 2025

Delegation isn't about dumping tasks on others—it's about **freeing up your time for high-value work while giving others a chance to grow**.

Done right, it benefits everyone. Done poorly, it creates confusion, frustration, and inefficiency.

This playbook will help you **delegate with confidence** using a **simple 5-step process**.

It also includes an easy to use 2x2 to decide **what is worthy of your time and what should be given to others to try**.

And finally, we've included some **drag and drop templates** you can use to communicate with your team.

Here we go!

Step 1: Identify the Right Tasks to Delegate

Not everything should be delegated. Here's how to decide:

✅ **Delegate if:**

- The task is **repetitive** and doesn't require your unique expertise.
- It's a **learning opportunity** for someone else.
- Someone else **can do it 80% as well as you** (or better).

❌ **Keep it if:**

- It requires **high-level strategic thinking** or confidential decision-making.
- It's a **new, high-risk initiative** where mistakes could be costly.
- It's something **only you can do** (e.g., signing off on major contracts).

Example: Instead of spending hours formatting a report, delegate it to a junior team member who wants to improve their presentation skills.

Step 2: Pick the Right Person

Delegating isn't just about lightening your load—it's about **developing others**. Choose someone who:

- **Has the skills (or the potential to learn)**
- **Has the bandwidth** to take it on
- **Would see it as a growth opportunity**

If no one is immediately ready, consider **mentoring them through the task** rather than doing it yourself.

Step 3: Set Clear Expectations

The biggest mistake? Assuming people will "figure it out." Instead:

1. **Explain the Why** – Why is this task important? How does it contribute to the bigger picture?
2. **Define the Outcome** – What does success look like? Be specific.
3. **Clarify Deadlines** – Set realistic timelines and priorities.
4. **Give Resources** – Share tools, templates, or guidance if needed.

✅ **Example of clear delegation:**
"I'd like you to take over the weekly sales report. This will free me up to focus on strategy, and it's a great chance for you to build your data analysis skills. The report should include last week's numbers, trends, and a one-slide summary for leadership. I'll send a template and review your first draft. Sound good?"

Step 4: Follow Up Without Micromanaging

Check-ins prevent misalignment but shouldn't feel like babysitting.

Try this approach:

- **Set an initial check-in** – "Let's touch base after your first draft."
- **Encourage questions** – "If you hit any roadblocks, feel free to ask."
- **Give feedback early** – Catch mistakes before they snowball.

Pro tip: Ask, *"What support do you need from me to make this successful?"*

Step 5: Close the Loop & Give Credit

When the task is done, recognize the effort:
✅ **Acknowledge what went well** – "Great job summarizing the data concisely."
✅ **Give constructive feedback** – "Next time, double-check the numbers before sending."
✅ **Share wins publicly** – "Alex took over the sales report and nailed it—big help to the team!"

Delegation isn't about dumping work—it's about **developing leaders**. When done right, it benefits everyone.

Ready to delegate more effectively? Use the Task Prioritization Matrix below to start.

This simple 2x2 matrix helps you decide what to **own, delegate, automate, or eliminate** based on **impact and effort**.

High Impact / Low Effort	High Impact / High Effort
✅ **Do It Now** – Quick wins, important work (e.g., approving key decisions, relationship-building).	🔄 **Prioritize & Plan** – Long-term strategic work (e.g., business growth initiatives, leadership development).

Low Impact / Low Effort	Low Impact / High Effort
🚀 **Delegate It** – Great for team growth (e.g., reports, scheduling, admin work).	❌ **Eliminate or Automate** – Time-wasters (e.g., redundant meetings, unnecessary processes).

How to use it:

- Anything in the **bottom-left (Low Impact/Low Effort) → Delegate immediately**.
- If it's in **bottom-right (Low Impact/High Effort) → Eliminate or automate**.
- Focus **your energy on High Impact tasks.**

Delegation Email & Conversation Templates

Delegation isn't just about handing off work—it's about **setting people up for success while freeing yourself for high-impact tasks**.

The key? Clarity and confidence. If you communicate why the task matters, what success looks like, and how you'll support them, you'll **avoid confusion, missed deadlines, and frustration.**

Use these plug-and-play templates to delegate effectively via email, Slack, or in-person conversations.

Delegation Email Template

📩 **Subject:** Need Your Help with [Task Name]

Hey [Name],

I'd like you to take the lead on **[task name]** because **[reason—growth opportunity, skill development, bandwidth, etc.]**.

Here's what's needed:
✅ **What needs to be done:** [Clear task description]
📅 **Deadline:** [Due date or key milestones]
🔗 **Resources:** [Any relevant tools, guides, or past examples]

This is a great opportunity to **[mention specific skill or experience they'll gain]**, and I trust you'll do a great job. Let's check in on **[date]** to answer any questions and make sure you have everything

you need.

Let me know if anything is unclear!

Thanks,
[Your Name]

In-Person or Slack Delegation Script

"Hey [Name], I need your help with something. I'd like you to take on [task] because [why it's valuable for them]. This will involve [brief description]. I trust you with it, and it's a great opportunity to [skill-building, leadership, etc.]. Let's check in [timeframe] to see how it's going. Sound good?"

Follow-Up & Feedback Template

📩 **Subject:** Quick Check-in on [Task Name]

Hey [Name],

Just checking in on **[task name]**—how's it going so far? Let me know if you've hit any roadblocks or need any support.

Also, if you've got any insights from working on this, I'd love to hear them! Let's touch base on **[date]** for a quick review.

Appreciate your work on this!

– [Your Name]

Delegation Close-the-Loop Template (Giving Credit & Feedback)

📩 **Subject:** Great Work on [Task Name]!

Hey [Name],

Just wanted to say **great job on [task name]!** Your work on **[specific aspect]** made a real impact, and I appreciate the effort you put into it.

A couple of things I noticed:
✅ **What they did well** – [Example]
🔄 **One improvement for next time** – [Example]

This was an important task, and you nailed it. Thanks again—I'll be looking for more ways to get you involved in [related projects]!

– [Your Name]

Great leaders know when to step up and when to step back. Delegation isn't about dumping work—it's about **empowering others, creating leverage, and freeing yourself for high-impact moves**. When you delegate effectively, you **break free from the grind**, your team **grows faster**, and everyone **wins**.

Now it's your turn. Start small, delegate with intention, and watch how much more **influence, impact, and freedom** you create.

Because a true **Career Vigilante** doesn't just get the job done—they build a crew that gets it done **better**.