

Sage Alliance Delegation Worksheet

The following steps will help you fill out the Sage Alliance Delegation Worksheet.

The first column are things *you* **Must Do**, meaning no one else can do these things. Examples include one-on-ones, performance reviews, skip level meetings and meetings that require your presence such as your manager's staff meeting. These are responsibilities you simply can't delegate.

The next column represents the things you can **Delegate Now**. Ask yourself these questions:

- Do I really need to attend that meeting or conference call?
- Do I have to be the one to write that report or create that presentation deck?
- What are the projects that others can run with while I oversee the bigger picture?

While it may take some time for your direct reports to get up to speed, you will feel like a burden has been lifted which frees up time for you to focus on the things that really matter to your more strategic role.

Now we come to the third column and the hardest to let go. These are the projects and responsibilities that fall into **Delegate Later**. You may feel like you will lose touch or lose control if you delegate these. Many times we know instinctively we don't have to do this task but there are reasons surrounding why you can't delegate this now. Identify the specific issue that stands in the way of you delegating this now. Maybe you are short staffed and there is no one to delegate to or it could be a matter of training or something else entirely. Regardless of the issue it's important to create a plan to delegate this sooner rather than later. Develop a 30-60-90 plan to address the issue and get these projects off your plate. Your success depends on it and your team will be happier with the new challenges and opportunities your delegation creates.