

# HOW TO DELEGATE

*SO IT GETS DONE!*



Founder & Principal  
**MOVE YOUR MOUNTAIN ADVISORY**

# Important: About This Handbook

This is a working handbook. The content from our live session is included, but it's important that you work through what you learned in order to implement.

You'll see guided exercises at the end of the handbook to capture your thinking and design real change. Don't skip them -this is where the real value happens.



# Delegation Is Not The Problem

Old delegation methods are! Delegation is more nuanced now with remote work, AI tools, and communication differences between generations.

Leaders are struggling with delegation because it often creates:

- More work
- More follow-up
- More frustration

At some point you've probably thought:

- "I'd be faster doing it myself."
- "If I don't check in, it won't get done."
- "Why am I redoing this?"

So delegation starts to feel like pressure instead of leverage. That's not a delegation problem, it's a setup problem.

This handbook will show you:

- How to diagnose what's actually going wrong
- What to set up before you delegate
- How to reduce rework and dependency

Let's do this!



# Start With the Real Problem

Think of the last time delegation didn't go well. What actually went wrong?

Most issues fall into one of three categories:

- Lack of Clarity
- Lack of Process
- Lack of Reliability

**Lack of Clarity** is a communication OR a training gap. They didn't fully understand what "done" looks like.

**Lack of Process** is undocumented, tribal knowledge. You know how to do it but it's not transferrable.

**Lack of Reliability** is a performance issue. It's not the system, it's the person.

These are all equally frustrating, but the solutions are different. if you don't diagnose correctly, you'll keep over-managing and delegation will not bring the relief it should.



# Delegation ≠ Offloading Work

Delegation is often misunderstood.

Delegation is NOT:

- Letting go
- Handing off tasks
- Getting things off your plate

Delegation IS:

- Building capability across your team
- Making better decisions before the work starts

There are two distinct parts:

1. Creating a delegation strategy
2. Putting delegation into practice

Most leaders skip straight to Step 2 and that's where problems begin.



# Part 1: Create a Delegation Strategy

Before you delegate anything, you need clarity on what you're doing.

## **Key Decisions to Make:**

### Task vs. Responsibility

Are you delegating a single task (or series of tasks) OR ownership of an outcome?

### Lowest Qualified Level

What is the lowest level that can handle this effectively?

### Risk Level

What happens if this is done incorrectly? Not all work carries the same consequences. Adjust your involvement accordingly.

### Purpose

Are you delegating for efficiency or development? The process (and the pace) is very different between them. If you're developing someone, allowing them to complete a task or own an outcome requires extra time and communication, but pays off in the long run.

**Delegation becomes easier when you strategically decide in advance.**



# Part 2: Set Communication Parameters

Most delegation problems show up later, but they are caused early. If you don't define how you work together, performance conversations become reactive and messy.

Communication parameters are not about one assignment or project. They define how you operate together across the whole body of work.

## Clear communication:

- Prevents defensiveness
- Improves accountability
- Builds trust
- Creates a softer landing for mistakes

Without this, every issue feels personal. Set the tone early with something like this: “I don't want to over-manage you, and it takes both of us to figure this out.”

## Question Prompts:

- How are you best led?
- How frequently should we check in?
- If you're struggling, how can I help without taking over?
- When something is off track, when do you raise it?
- What does a good update look like?
- Where are we most likely to misinterpret each other?

**You don't have to accommodate everything, but you do need to create clarity.**



# Part 3: Put Delegation Into Practice

Once strategy and communication are in place, execution becomes simpler. Without them, delegation becomes reactive.

## What NOT to Do:

- Try to clone yourself
- Assume they understand
- Focus on being right vs. being effective

Assumptions is one of the biggest drivers of rework. Something might feel obvious to you, but it's often the exact thing you need to explain.

## What TO Do:

- Define big-picture outcomes
- Understand strengths before assigning work
- Provide proper training

Clarity up front saves time and frustration later.

## When Things Go Wrong (and they will)

Go back to your foundation:

- What are the communication protocols we should follow?
- Was the strategy correct and clear?
- Was the handoff set up properly?
- OR is this a performance issue?



# The Real Goal of Delegation

Remember, delegation is not about getting work off your plate. (Although, that is definitely a desired outcome!)

It's about:

- Building capability
- Increasing leverage
- Reducing dependency

If someone can only succeed with your constant involvement, that's not delegation. That's supervision.

## RECAP:

- Most delegation problems are clarity, process, or reliability issues
- Delegation is set up before the work starts
- Delegation builds capability, not dependency

**There is space for you to work through your delegation strategy and practice at the end of this handbook. You can print and reuse as often as you like.**



# Still confused or stuck?

This handbook can't possibly cover every situation, but if you're still struggling, let me know! Feel free to send an email and share your questions or any big takeaways from this session.

**My email: [info@barbmonson.com](mailto:info@barbmonson.com)**

I firmly believe that everyone should be able to thrive at work, and I am passionate about working with leaders and their teams to improve execution and increase IMPACT.

Thank you for being a part of How To Delegate So It Gets DONE!  
[Connect with me on LinkedIn](#) and let's stay in touch.

## Thank you!

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# Exercises to Follow



# Diagnose the Breakdown:

Think of the last time delegation didn't go well.

What happened, and how did you respond?

Now identify the root issue:

- Lack of Clarity
- Lack of Process
- Lack of Reliability

What makes you choose that root issue?



# What Should You Be Delegating?

Write down one thing you're currently doing that you shouldn't be:

Is this a task or responsibility?

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What is the lowest qualified level to handle this?

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What is the risk if it's done poorly?

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Are you delegating this for efficiency or for development?

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# Strengthen One Working Relationship

Name one employee you currently manage:

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Choose 2 questions that would improve how you work together:

- How are you best led?
- How frequently should we check in?
- If you're struggling, how can I help without taking over?
- When something is off track, when do you raise it?
- What does a good update look like?
- Where are we most likely to misinterpret each other?

**Why do these matter for this person?**

**What problem would this solve?**

When will you ask these? (Be specific.)

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# Rework the Situation

Go back to the situation you described earlier. What would you change?

**Strategy:**

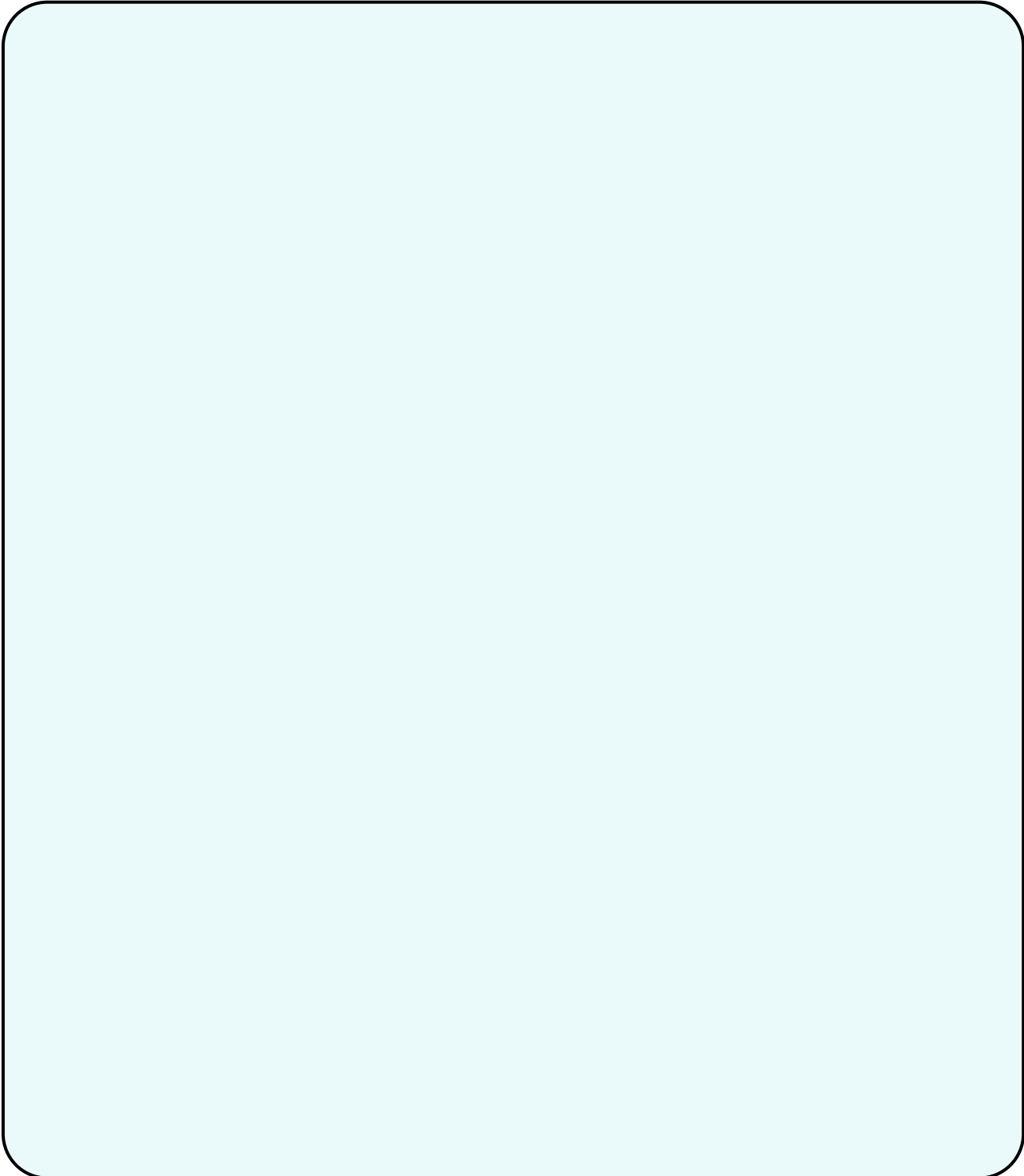
**Communication:**

**Tactics / Execution:**



# Your Delegation Plan

Step 1: List Your Full Body of Work:



# Your Delegation Plan (cont'd)

Step 2: Categorize by Level or Skillset

**High-Level / Strategic:**

**Mid-Level / Experienced:**

**Entry-Level / Repeatable:**



# Your Delegation Plan (*cont'd*)

## Step 3: Decide What to Delegate

**What will you delegate now?**

**What will you keep (for now)?**



# Your Delegation Plan (cont'd)

Step 4: Apply this Framework to Each Item You Delegate

Task or responsibility:

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WHO is the lowest qualified level?

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What does “done” look like?

How will you communicate and check in?

