LEVELS OF DELEGATION

Tasks:

In the left-hand column of the chart on the next page, list the various tasks/processes of your business that you touch in any way.

You might want to start with the time leeches you identified during your last checkpoint. If you need further help thinking about your tasks, we recommend you revisit your daily time sheets, calendar, even your email and social media can shed light on what tasks you take on.

Roles:

Across the top of the chart, list the different roles on your team (if you have more than four, use multiple sheets). For smaller organizations these may be individuals (e.g. Assistant Manager), for larger organizations these may be groups (e.g. Team Leads).

Try to refrain from using people's names at this point. You want to focus on Roles and not specific individuals. Later you will be able to assess which individuals are the right fit for which roles.

Levels:

Go through your list of tasks and for each task indicate each role's current and desired engagement with the task by utilizing the numbers below. Place one of the numbers below in the "Now" column for each role. This number describes how the role currently engages with the task. Then place one of the numbers below in the "future" column for each role. This number describes how you want the role to engage with the task in the future.

0 – No Engagement
    This role does not do this task.
1 – Wait to be Told
    This role only engages with this task if I direct them to do so.
2 – Seek Approval
    This role can engage with this task if they secure my permission first, every time.
3 – Engage and Report Immediately
    This role is expected to perform this task when it arises and immediately report the outcome to me.
4 – Engage and Report Routinely
    This role is expected to perform this task when it arises and utilize existing systems/structures (e.g. weekly meeting, integrated software, etc.) to routinely report the outcomes to me.

Task or Procedure Refer to daily Task Sheets If needed	**Role**		**Role**		**Role**		**Role**	
	Now	**Future**	**Now**	**Future**	**Now**	**Future**	**Now**	**Future**