



THE GROWTH MULTIPLIER

Delegation Checklist for Leaders

**A step-by-step guide for every
delegation conversation**

Use this checklist before, during, and after every significant delegation conversation.



How to use this checklist

This checklist has five sections, one for each stage of a delegation: before you delegate, during the conversation, and after. Work through it in order the first few times. Over time it will become instinctive. Use the Notes column and write-in boxes to capture your specific answers – they make each delegation concrete rather than abstract.

QUICK REFERENCE: THE FIVE LEVELS OF DELEGATION

Before any delegation conversation, decide which level applies. The level determines how much decision authority you are actually transferring. Being explicit about this – before the work begins – is the single most important thing you can do to prevent delegation from failing.

Level	Name	What it means	Circle one →
L1	Research & Report	You find the information. I decide.	<input type="radio"/> L1 — Research & Report
L2	Recommend	You recommend an option. I make the final call.	<input type="radio"/> L2 — Recommend
L3	Decide with Check-In	You decide, but confirm with me before acting.	<input type="radio"/> L3 — Decide with Check-In
L4	Decide & Inform	You act independently and tell me afterward.	<input type="radio"/> L4 — Decide & Inform
L5	Full Ownership	You own this completely. Escalate only if needed.	<input type="radio"/> L5 — Full Ownership



The most important question to ask yourself

When the person finishes this work, will they come back to me for final approval? If yes – regardless of how you frame the assignment – you have not actually delegated. Real delegation means the person owns the outcome, not just the execution.

1 BEFORE YOU DELEGATE

Is This Ready to Hand Off?

Run through these questions before the delegation conversation. If any answer gives you pause, resolve it first – otherwise the delegation will likely fail or bounce back.

	Before delegating, confirm:	Notes / Write Your Answer Here
<input type="checkbox"/>	I have chosen work that genuinely develops the person — not just work I want off my plate.	
<input type="checkbox"/>	This work does not carry a risk that would be unrecoverable if something goes wrong.	
<input type="checkbox"/>	I am not holding onto this work for psychological reasons (habit, identity, reluctance to let go) rather than genuine organizational need.	
<input type="checkbox"/>	I have a realistic picture of this person's current skill and confidence on this specific type of task — not their general ability.	<i>New to this? They need direction. Developing? Coaching. Capable but hesitant? Support. Expert? Autonomy.</i>

	Before delegating, confirm:	Notes / Write Your Answer Here
<input type="checkbox"/>	This person currently has the bandwidth to take this on — they are not already overloaded.	<i>If overloaded: rebalance workload first. Delegating to a stretched person sets them up to fail.</i>
<input type="checkbox"/>	This person genuinely wants this kind of responsibility — it is not being forced on them.	<i>Delegation to someone unmotivated produces resentment, not ownership.</i>

What specifically is being delegated? (Write it in one clear sentence)

Why am I delegating this to this person – what will they develop?



If you cannot answer the development question

If you cannot identify what the person will learn or grow from this delegation, you may be redistributing work rather than developing a person. That is not wrong – but it is different from true delegation, and it will not build capability over time.

2

THE DELEGATION CONVERSATION

WHAT TO COVER

This is the conversation where clarity is created. Cover each of these areas explicitly – do not assume the person will fill in the gaps. Ambiguity here is the most common cause of delegation failing.

2a Decision Authority

	Before delegating, confirm:	Notes / Write Your Answer Here
<input type="checkbox"/>	Which level of the Five Levels applies to this assignment (L1 through L5).	<i>Say it out loud. Do not leave it implied.</i>
<input type="checkbox"/>	What they can decide independently — without checking in with me first.	
<input type="checkbox"/>	What requires a check-in with me before acting on.	
<input type="checkbox"/>	What must be escalated to me (situations outside their authority or carrying significant risk).	

2b What Success Looks Like

	Have you defined:	Notes / Write Your Answer Here
<input type="checkbox"/>	The specific outcome I want — not the process for getting there.	<i>Describe the destination. Let them choose the route.</i>
<input type="checkbox"/>	What a successful result looks like in concrete, measurable terms.	<i>Vague: 'do a good job.' Specific: 'a recommendation we can act on by the 15th, with three options and a clear rationale.'</i>

	Have you defined:	Notes / Write Your Answer Here
<input type="checkbox"/>	Any quality standards, constraints, or non-negotiables they need to know.	<i>Budget limits, stakeholder sensitivities, things not to change.</i>
<input type="checkbox"/>	The deadline — and whether it is a hard deadline or a target.	

Define success in one or two sentences — what does 'done well' look like?

2c Context and Resources

	Have you provided:	Notes / Write Your Answer Here
<input type="checkbox"/>	The background they need — including things they may not know that would change how they approach this.	<i>People with full context make better decisions. People without it make safe ones — which are often the wrong ones.</i>
<input type="checkbox"/>	The reason this matters — why does this work matter to the organization, the team, or the customer?	<i>People who understand the 'why' adapt better when circumstances change and care more about quality.</i>
<input type="checkbox"/>	The tools, systems, or information they need to execute.	
<input type="checkbox"/>	The names of stakeholders they can talk to — and any sensitivities about how to engage them.	
<input type="checkbox"/>	Explicit permission to make decisions and act without checking in at every step.	

2d Checkpoints

	Have you agreed on:	Notes / Write Your Answer Here
<input type="checkbox"/>	Specific milestone check-ins — not open-ended 'let me know how it goes.'	<i>Milestone: 'Let's connect when you have a first draft' or 'Check in when you've heard from all three vendors.'</i>
<input type="checkbox"/>	What the check-in is for: to discuss learning and decision-making, not just to review status.	<i>Shift from 'how is it going?' to 'what decisions have you made?' and 'where are you getting stuck?'</i>
<input type="checkbox"/>	That I will not intervene between checkpoints unless something changes significantly.	<i>If you check in more than agreed, you signal distrust and undermine ownership.</i>

2e Tolerance for a Learning Curve

	Have you explicitly said:	Notes / Write Your Answer Here
<input type="checkbox"/>	That I expect some imperfect attempts — that is part of the process, not a failure.	<i>Saying this out loud changes behavior. People take more initiative when they know mistakes are allowed.</i>
<input type="checkbox"/>	How I want to be told if something is going wrong — and that telling me early is the right move, not a sign of weakness.	
<input type="checkbox"/>	That my measure of success includes how much they are learning, not just whether the output is perfect.	

What is the one most important thing for this person to understand going into this assignment?



Watch for reverse delegation in the conversation

If the person responds to the assignment with lots of questions that feel like they are looking for you to make the decisions – slow down. Ask 'What do you think the answer is?' or 'What would you recommend?' before answering. This is not deflection. It is the first development moment of the delegation.



3

DURING THE WORK

Staying Engaged Without Hovering

The hardest part of delegation is resisting the urge to step back in. This section helps you stay appropriately involved – enough to support development, not so much that you undermine ownership.

	While the work is in progress:	Notes / Write Your Answer Here
<input type="checkbox"/>	I am holding to the check-in schedule we agreed — not checking in more often because I am anxious.	
<input type="checkbox"/>	When they bring me questions, I am asking 'What do you recommend?' before offering my view.	<i>This forces thinking and builds judgment. Every time you answer before they have thought it through, you do their development for them.</i>
<input type="checkbox"/>	My check-in questions focus on learning and decisions, not just status.	<i>Ask: 'What decisions have you made?' 'Where are you getting stuck?' 'What would you do differently so far?'</i>
<input type="checkbox"/>	I am not redoing, editing, or adjusting their work unless it is genuinely wrong — not just different from how I would do it.	<i>"Different from me" is not a quality problem. It is development in progress.</i>
<input type="checkbox"/>	If something is going wrong, I am coaching them through it rather than taking it back.	<i>Taking it back at the first sign of difficulty destroys trust and confirms that your delegation was conditional.</i>
<input type="checkbox"/>	I am noticing and naming what they are doing well — not just where they are falling short.	



Signs that reverse delegation is happening

Watch for: the person checking in far more often than agreed, framing questions as problems rather than as options they have considered, or waiting for your input before acting on anything. These are signals that ownership has not truly transferred. The fix is not to push them away – it is to return ownership with a question: 'What would you do if I were not available?' Then listen.

At each check-in: What am I noticing about how this person is developing? (Note it here)



4

AFTER

The Debrief That Makes Delegation Compound

This is the step most leaders skip — and it is where the real development happens. Without a structured debrief, delegation produces execution but not growth. Invest 15 minutes. The return is a person who is more capable next time.

	In the debrief, cover:	Notes / Write Your Answer Here
<input type="checkbox"/>	What worked well? (Name it specifically — vague praise does not compound.)	<i>Example: 'The way you handled the pushback from the vendor was exactly right.'</i>
<input type="checkbox"/>	What would you do differently? (Ask them first — before offering your view.)	<i>Their answer tells you more than your answer does. It reveals how they are thinking about their own performance.</i>
<input type="checkbox"/>	What did you learn about this type of work that you did not know before?	
<input type="checkbox"/>	What decisions did you make that you are most confident in? Least confident in?	
<input type="checkbox"/>	What would you want more clarity on before taking on something similar again?	
<input type="checkbox"/>	I have told them explicitly what capability they have built and how it matters for their future.	<i>Naming development makes it real. Most leaders do not do this — and most employees do not connect the dots themselves.</i>
<input type="checkbox"/>	I have decided whether to raise, maintain, or lower the delegation level for this person on this type of work going forward.	<i>Delegation levels should evolve as capability grows. Review it explicitly rather than leaving it implied.</i>

What did this person demonstrate during this assignment? (Capabilities, judgment, approach)

What is the next stretch assignment or level of authority I could offer this person?



What the research shows about debriefs

The evidence on leadership development is clear: training effects on skills and behavior grow stronger over time when there is structured reflection and feedback tied to real outcomes. The debrief is not a courtesy – it is the mechanism through which capability compounds. Leaders who consistently debrief well produce teams that grow measurably faster than those who skip it.



5

PERIODIC SELF-AUDIT

Are You Still the Bottleneck?

Use this section monthly or quarterly. It is not about any single delegation — it is about whether your delegation practice is actually shifting the organization over time.

	Ask yourself honestly:	Notes / Write Your Answer Here
<input type="checkbox"/>	Where are the decisions in my organization that consistently slow down or get stuck waiting for me?	
<input type="checkbox"/>	What decisions am I making that, if I am honest, someone else could make with the right support?	<i>Be specific. Not 'strategic decisions' — name the actual decisions.</i>
<input type="checkbox"/>	Am I delegating tasks but keeping decision authority? (The most common form of fake delegation.)	
<input type="checkbox"/>	Are the people on my team becoming more capable and more autonomous over time — or are they just as dependent on me as they were a year ago?	
<input type="checkbox"/>	When someone on my team brings me a problem, is my first instinct to answer it — or to ask what they recommend?	
<input type="checkbox"/>	Am I modeling the delegation behaviors I want to see in my direct reports? Do they delegate well?	
<input type="checkbox"/>	If I were unavailable for a month, which decisions would genuinely stall — and why?	

Where is my biggest bottleneck right now? One specific area:

What is one delegation I could make in the next two weeks that would move the needle?

WARNING SIGNS THAT DELEGATION IS NOT WORKING

Warning sign nestly:	What it signals and what to do
You are the most common answer to 'who needs to approve this?'	Decision authority has not been genuinely transferred. Use the Five Levels explicitly.
Decisions are slow even though your team is capable	Ownership is ambiguous. Nobody is sure who is actually empowered to decide.
Your team escalates problems rather than solutions	Reverse delegation is active. Start responding with 'What do you recommend?' instead of answering.
You find yourself redoing or significantly editing delegated work	You may be accepting work at Level 3 but expecting Level 5 quality. Recalibrate or invest in development.
People seem reluctant to take on new responsibility	They may not feel safe to try and fail. Explicitly tolerate imperfect first attempts. Name it out loud.

Warning sign nestly:	What it signals and what to do
Your team's capabilities are not growing year over year	Delegation is happening but development is not. Add debriefs and deliberate coaching to every delegation.



The measure of success

The goal of delegation is not a shorter to-do list. It is a team that makes better decisions than it did a year ago, with less need for your direct involvement. If your team is growing in capability and confidence – and if you are consistently working at a higher level than you were twelve months ago – the checklist is working.

This checklist is grounded in peer-reviewed research including the CIPD Leadership Development Evidence Review (2023), the Geerts PMC Framework (2024), and primary studies on psychological empowerment, delegation, and training transfer. For the full evidence base and plain-language explanations of all frameworks, see The Growth Multiplier whitepaper.

