



# DELEGATION CLARITY TOOLKIT

A PRACTICAL GUIDE TO DELEGATE EFFECTIVELY

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## WELCOME TO YOUR DELEGATION CLARITY TOOLKIT!

Delegation isn't just about handing off tasks—it's about setting your team up for success. Use this toolkit to delegate with confidence, build clarity around expectations, and avoid the trap of micromanagement.

## DELEGATION PLANNING CHECKLIST

- ☐ Have I clearly defined the outcome or goal of this task?
- ☐ Have I identified the best person to handle this based on skills or growth potential?
- ☐ Have I communicated the deadline and any time constraints?
- ☐ Does the person know what level of autonomy they have?
- ☐ Have I offered support while giving space for ownership?
- ☐ Have I built in agreed-upon check-ins or updates?
- ☐ Have I let go of the 'how' and focused on the 'what' and 'why'?





## MATCH THE TASK TO THE RIGHT PERSON

Use this template to match tasks with team members intentionally:

| Task/Project            | Team Member | Why They're a Good Fit                   |
|-------------------------|-------------|--|
| Client Report Draft     | Alex        | Strong writing and analytical skills     |
| Internal Workflow Audit | Priya       | Detail-oriented and process-driven       |
| Team Offsite Planning   | Jordan      | Creative thinker and good with logistics |



## DELEGATION CLARITY SCRIPT

Use this script when assigning a task to promote alignment and clarity:

Here's the outcome I'm looking for: [Insert goal here]. I'd love for you to lead this. The deadline is [Insert deadline]. Let's check in [Insert checkpoint], and you have full autonomy to own the approach. Let me know what support you'll need from me to make this successful."





## DEBRIEF GUIDE: LEARN AND CELEBRATE

After a task is completed, use these prompts to reflect and grow:

- What went well in how the task was delegated and executed?
- Were expectations clear at the start?
- How did I support without hovering?
- What did the team member learn or accomplish?
- What would I adjust next time I delegate a similar task?

## WEEKLY DELEGATION TRACKER

Use this to track your delegation efforts and reflect on your leadership habits.

| Date | What I Delegated | To Whom | Reflection/<br>Outcome |
|------|------------------|---------|------------------------|
|      |                  |         |                        |
|      |                  |         |                        |

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