

SCOTT DRAKE'S DELEGATION GRID™

Delegation is a make-or-break skill for managers and leaders at all levels. Those who do it well are more productive, have engaged teams, and are free to focus on higher-value activities. Those who delegate poorly become bottlenecks for decisions, demotivate teammates, and waste time working below their pay grade.

Use this grid to identify the best delegation strategy based on what you're delegating and the level of trust you have in the person you're delegating to.

	Task	Problem	Responsibility
Low Trust	Show them how to do it, tell them why	Ask them to research and report back	Give detailed plans
Medium Trust	Let them do it, but observe, coach, correct	Ask them to research and make a recommendation	Give boundaries and scope, ask for plans
High Trust	Ask them to do it, report back	Ask them to decide and share decision criteria	Give management control
Total Trust	Ask them to do it, no need to report back	Ask them to decide and do, no need to report back	Make them fully accountable

LEVELS OF DELEGATION

- **Task:** Specific actions or steps within a larger initiative or ongoing concern. Trainable systems exist. How to do it is known.
- **Problem:** Specific challenges to resolve. May not know the desired outcome, standards, or tradeoffs when delegating. How to do it must be learned.
- **Responsibility:** Ownership for the successful management, decision-making, and outcomes related to a project or ongoing concern.

LEVELS OF TRUST

- **Low:** New relationship/task for person with no external proof, or past performance was poor.
- **Medium:** New relationship/task with external proof, or past performance was acceptable.
- **High:** Past performance is consistently high.
- **Total:** Past performance consistently exceeds expectations.

TRUST ADJUSTMENTS

- + Give more trust in areas where you lack expertise.
- Give less trust in areas you deem as high risk.

The logo features the name "Scott Drake" in a large, elegant, cursive script. Below it, the word "consulting" is written in a smaller, clean, lowercase sans-serif font, centered under a thin horizontal line.

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DELEGATION GRID™ FOR RESPONSIBILITIES

Delegating a responsibility is delegating management control. There are five major areas of management, and these are often delegated to non-managers.

1. **Vision and Goal Setting** is deciding and communicating long-, mid-, and short-range goals within the sphere of responsibility.
2. **Planning** is the process of deciding how to achieve goals.
3. **Organizing Resources** is the process of finding and allocating financial, material, and human resources.
4. **Steering and Adjusting** is the process of checking progress and adapting plans.
5. **Delegation and Leading** is the process of dividing a sphere of responsibility into tasks, problems, and sub-responsibilities, and working through others.

In low-trust situations, the delegator will keep responsibility for the first four areas.

In high-trust situations, the delegator will grant responsibility for the first four areas. It is not uncommon for the delegator to maintain control of long-range vision and goal setting.

	Delegation Strategy	Vision and Goal Setting	Planning	Organizing Resources	Steering / Adjusting	Formal Check In
Low Trust	Give detailed plans	Keep	Keep	Keep	Keep	Daily
Medium Trust	Give boundaries and scope, ask for plans	Keep	Give / Approve	Share	Share	Weekly
High Trust	Give management control	Share	Give	Give	Give	Bi-Weekly
Total Trust	Make them fully accountable	Give	Give	Give	Give	Monthly



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SEVEN STEPS FOR DELEGATION

STEP 1: ANSWER THREE QUESTIONS

What am I delegating? What is my level of know-how? What is the risk?

STEP 2: CHOOSE WHO TO DELEGATE TO

Pick the right person for this assignment.

STEP 3: CHOOSE A DELEGATION STRATEGY

Use Delegation Grid™ to select one of 12 strategies and document assignment.

STEP 4: DELEGATE

Make the assignment and provide clear instructions.

STEP 5: NEGOTIATE

Discuss expectations and reach an agreement.

STEP 6: CHECK IN

Track progress and give support.

STEP 7: GIVE AND GET FEEDBACK

Celebrate. Learn what to do better next time.

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