

THE DELEGATION WORKSHEET

A practical way to decide what to keep, delegate, document,
or stop doing altogether.

CLEAR BOOKS. CALM OPERATIONS. CONFIDENT DECISIONS.

Business Operations & Bookkeeping Support



If It Is Easier to Do It Yourself, Delegation Never Gets Easier

Many business owners know they need to delegate, but the work still comes back to them. Sometimes the task has never been clearly handed over. Sometimes the information lives only in the owner's head. Sometimes explaining it feels slower than simply doing it.

This worksheet helps you separate the work that truly needs your judgment from the work that can be owned, supported, documented, simplified, or stopped.

The goal

Delegation is not about giving away everything you do. It is about protecting your time for the work that genuinely requires you - while creating enough clarity for someone else to succeed with the rest.

Signs you may be carrying too much

- ☐ I am the default person for questions that someone else could answer.
- ☐ Tasks stall when I am unavailable.
- ☐ I regularly think, 'It will be quicker if I just do it myself.'
- ☐ I am spending time on routine work while higher-value priorities wait.
- ☐ I have delegated tasks before, but they keep coming back to me.
- ☐ Important processes are difficult to explain because they are mostly in my head.

Capture What You Are Actually Doing

Think across a normal week and month. Include the small recurring tasks that are easy to overlook.

Task / responsibility	How often?	Approx. time	Only I can do this?
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐

What surprised me about this list?

Sort the Work Into Four Buckets

Do not decide who will take the work yet. First decide what kind of work it is.

KEEP

Work that genuinely requires your authority, judgment, relationships, expertise, or ownership.

DELEGATE

Work that needs to happen but can be successfully owned by someone else with the right context and authority.

DOCUMENT / SYSTEMIZE

Work that is repeatable but currently depends too heavily on memory, explanation, or one person's way of doing it.

STOP / REDUCE

Work that no longer adds enough value, is duplicated, is unnecessarily frequent, or exists because 'we have always done it.'

Use the Delegation Filter

For each task you are considering handing over, answer these questions.

- ☐ Does this task require my unique authority or expertise?
- ☐ Would a capable person be able to learn it with clear instructions and access?
- ☐ Is the desired outcome clear?
- ☐ Can I define what 'done well' looks like?
- ☐ Can the person be given enough authority to act without asking me at every step?
- ☐ Is there a sensible check-in point rather than constant supervision?
- ☐ Would delegating this create meaningful time or mental capacity for me?

A useful rule

If the task can be taught, the outcome can be defined, and the person can be given appropriate authority, it is usually a delegation candidate - even if you can currently do it faster.

My strongest delegation candidates:

Why Does Delegated Work Bounce Back?

If you have tried to delegate something before and it returned to you, identify what was missing.

- ☐ The outcome was not clearly defined.
- ☐ The person did not have the information they needed.
- ☐ The process existed only in my head.
- ☐ They did not have access to the right files, systems, or people.
- ☐ I delegated the task but not the authority to make decisions.
- ☐ There was no clear deadline or trigger.
- ☐ There was no agreed check-in point.
- ☐ I stepped back in too quickly instead of allowing them to own it.
- ☐ The task was assigned to the wrong role or person.
- ☐ The task itself is unnecessarily complicated and should be simplified first.

The pattern I most need to change:

Build a Better Handoff

Choose one delegation candidate and make the handoff clear enough that the other person has a real chance to own it.

Task / responsibility	
Why this matters	
Desired outcome / definition of done	
What information, files, or systems are needed?	
What decisions can they make without me?	
What should be escalated back to me?	
Deadline / recurring trigger	
Check-in point	

Delegate Authority, Not Just Tasks

A person cannot truly own work if every small decision still requires your approval.

They can decide without me	Check with me when...	I will remain responsible for...

Think in guardrails

Good delegation gives someone room to act inside clear boundaries. Define the decisions they can make, the limits that matter, and the situations that genuinely require escalation.

Document Just Enough to Make the Work Repeatable

You do not need a 20-page SOP for every task. Start with enough information that a capable person can repeat the work consistently.

- ☐ Purpose: Why does this task exist?
- ☐ Trigger: What tells the person it is time to act?
- ☐ Inputs: What information or files do they need?
- ☐ Steps: What are the essential actions?
- ☐ Standard: What does a good result look like?
- ☐ Exceptions: What unusual situations should be escalated?
- ☐ Completion: How is the task recorded or handed off when finished?

Process / task I will document first:

Where the instructions will live:

Your 30-Day Delegation Plan

Start small enough to follow through. Three well-delegated responsibilities are more useful than ten vague handoffs.

Task	New owner	What they need	Handoff date	Review date

Time I hope to reclaim each week:

What I will use that capacity for:

Is the Work Truly Off Your Plate?

After the first few weeks, review the delegation rather than simply taking the work back.

- ☐ The new owner understands the outcome.
- ☐ They have the access and information they need.
- ☐ They know what they can decide without me.
- ☐ Check-ins happen at agreed points rather than continuously.
- ☐ The work is being completed to an acceptable standard.
- ☐ Questions are becoming fewer as ownership grows.
- ☐ I am resisting the urge to redo work simply because I would do it differently.
- ☐ The task no longer occupies the same amount of space in my head.

What needs to be clarified or improved?

Different is not automatically wrong

Successful delegation does not mean someone performs the work exactly as you would. If the agreed outcome, standards, and guardrails are being met, allow room for another capable person's approach.

Delegation Should Create Capacity, Not More Management

The strongest delegation is not a task dump. It creates clear ownership, gives the right person enough context and authority to succeed, and reduces unnecessary dependence on the business owner.

If you discover that you know what needs to come off your plate but do not have the right person or operating structure to own it, that is valuable clarity. The next step may be support rather than another productivity system.

When support may help

Executive Business Support, Business Operations Support, or Back Office Operations can help when priorities, recurring responsibilities, communication, coordination, documentation, and follow-through need a dependable owner behind the scenes.

SCHEDULE A DISCOVERY CALL

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