

# DIRECT REPORT ACTION PLANNING (P1)

DIRECT REPORT NAME

ABOUT MY DIRECT REPORT

HIGHEST FACTOR

LOWEST FACTOR



## THE WORK TO DELEGATE

Describe the work, timeline, their decision rights, and what success looks like

THEIR KEY DELEGATION NEEDS

DELEGATION DOS

DELEGATION DON'TS

# DIRECT REPORT ACTION PLANNING (P2)



## YOU AS A DELEGATOR

Review your strengths and caution areas as a delegator, your direct report's needs, and the work to be delegated.

## DIRECT REPORT NAME

What do you need to be aware of regarding your style?

What 1-2 adjustments will you make?

## ENSURING SUCCESS

### COMMUNICATION

Why did you choose this person to delegate to?

How can this benefit them, the team, and the organization?

### LEADERSHIP

What do you need to do to help them begin?

What will they need from you after the initial hand-off to help them succeed?