

Delegation and briefing template

Delegation and briefing are crucial aspects of strong leadership and the development of a high-performance team. But, it can also be a challenging area to get right.

Knowing how to select the right person for each task/project and what order to do each step can be daunting if you're not used to delegating or you're new to a particular team or project type.

In this template, we break down each step and the order in which to do them to give you the best chance of success. Follow this guide and you'll ensure that your team members will grow, thrive, and enjoy working with you.

Remember, the more you stick to a strong, clear briefing structure the more your team will know what to expect, what's expected of them, and how to hit the ground running with any project.

Briefing template

Summarize the project

Start with a paragraph that neatly sums up what they'll be doing and why it's important.

Being articulate about the why is very important because it ensures everyone is focused on the right problem.

For example, this opening could outline that you need a member of your team to identify certain customers from a pool of data and carry out interviews with them over the phone to gain a better understanding of how those customers use and perceive your product.

List your objectives

It's vitally important that you over-communicate when it comes to your objectives, don't assume that everyone in the room knows what you're thinking.

Outline exactly what you want to learn/achieve and what problem you're trying to solve.

Sticking with the example we gave above, perhaps your objective is to ascertain what makes customers use certain features of your product as opposed to others. You want to find out what motivates them and what they consider useful.

State the deliverables

What do you want to see at the end of the process? Recordings? Transcripts? Data analysis?

Make sure your team members know what they need to present back to you and the key info you're looking for so they don't waste their time or yours.

Be sure to specify formats if that's important and list everyone that needs visibility on the project.

Define tone and message

Your overarching brand message and company values should carry through in everything you do and this is vitally important if your team speaks directly to customers.

Make sure they have a good understanding of the tone of voice they should use and specific keywords in order to get useful responses.

Provide a timeline

This is fairly self-explanatory but if you brief something in you need to make it clear when you need this work completed.

Watch out for situations where there are different stages involved in a single task and provide mini-deadlines for each stage if necessary.

Signpost help and resources

One element of a briefing that's often overlooked is providing helpful resources and advice in the initial meeting to really give the project the kickstart it needs.

You can save so much time further down the line if your team members know who they should direct questions to (other than yourself of course) and where to find helpful advice from the beginning.

Summarize and check-in

The end of your briefing should be a summary of what you've discussed to make sure the key points have landed and you and your team members can begin the project with confidence.

Let your team know when you'll be checking in on their progress and remind them they can always come to you for help or with their thoughts as the project goes on.

Delegation guide

Know your team

Who on your team is a natural when it comes to speaking with clients? Who can give a killer presentation to internal stakeholders? Who loves working collaboratively with different teams and who prefers analyzing data in a more focused way?

Create a list of your people and their corresponding talents/skills/areas of expertise and let that guide you. This list will also come in handy when it's time to discuss progress in your one-to-one meetings.

As we said earlier, you may find there's a little bit of trial and error when you first take over the team.

Consider self-selection

Allowing your team members to select themselves for a certain task will tell you a lot about who they are as people and where their interests really lie. It's also a very effective way of demonstrating you trust them.

A word to the wise, however, if you use this method be careful that you don't fall into the trap of allowing the same people to do the same tasks over and over again to the detriment of their professional development or team harmony.

Explain and reassure

If you're delegating a task to someone in a way that might seem out of the blue and it's something that falls outside of their normal duties, make sure you explain why you picked them for the job and why it's important.

Point to a time where they demonstrated skills that will be needed in this task and explain how you hope to see them develop.

Provide a clear brief

Follow the guide above.

Provide training and resources

Gauge how much training this team member will need in order to complete the task to a high standard. Is there a day course they could go on? Do they need to shadow someone?

If it's something you can help them with you should first demonstrate how you would do it, then do it together and then observe them do it to make sure they've taken in your instruction.

If they need to use a tool they've never used before make sure you give them some time to become familiar with it first and ask questions.

Empower them

Have you ever been in a situation where your boss has given you a job to do but no actual authority to make decisions? It can be a pretty frustrating position to be in.

Make sure that you delegate responsibilities and authority so they can tell others what they need and make creative decisions themselves.

If you don't you run the risk of the work stalling because the person you've tasked with the job constantly has to ask for help or permission.

If there are certain areas you feel you need a final say on then highlight those, to begin with, however, in general, your team members should feel empowered to get the job done themselves.

Assess and provide feedback

It can be very frustrating to work hard on something and get no feedback on how you did and what impact it made. Provide a debrief on how the project went from your perspective, including constructive criticism if necessary.

And if their work made a difference to customer experience or behavior, tell them and thank them! Everyone should feel in tune with the end customer and knowing they made a difference should be a huge motivating factor.
