

Delegation Organized – Briefing Checklist

Guidelines

1 Task Overview

Guiding Questions:

- What is this task called?
- Who is responsible?
- When must it be completed?

Example: Blog post draft for website, assigned to Alex, due Friday 10 AM

2 Outcome / Deliverable

Guiding Questions:

- What does “done” look like?
- What are the key measurable results?

Example: 750–1000 word blog post, SEO optimized, with 2 internal links and a downloadable checklist

3 Key Steps / Instructions

Guiding Questions:

- What are the main steps to complete this task?
- Which steps require your review?

Example: Research topic → Draft → Submit for review → Format for WordPress

4 Decision Boundaries

Guiding Questions:

- What can the team member decide on their own?
- What needs my approval?

Example: Formatting, linking → team decides; headline and meta description → needs approval

5 References / Resources

Guiding Questions:

- Are there any templates or examples to reference?
- What materials make this task easier?

Example: Last month’s blog post, brand style guide, downloadable checklist template

6 Communication / Check-Ins

Guiding Questions:

- How often should I check in?
- What’s the preferred communication method?

Example: Draft check-in Wednesday 3 PM via Slack; final review Thursday morning

💡 Quick Tip:

Keep this checklist reusable. Over time, you’ll build a **library of task templates**, reducing errors, saving time, and **building operational trust in your team**.

Ensure clarity, reduce errors, and free your time when delegating tasks.

Delegation Organized – Briefing Checklist

1 Task Overview

- Task / Project Name: _____
 - Assigned To: _____
 - Deadline / Priority: _____
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2 Outcome / Deliverable

- Expected result / deliverable: _____
-
-
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3 Key Steps / Instructions

- Step 1: _____
 - Step 2: _____
 - Step 3: _____
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4 Decision Boundaries

- Independent decisions: _____
 - Requires review/approval: _____
-
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5 References / Resources

- 6 Communication / Check-Ins**

- ## 7 Notes / Special Instructions

Virtual ORGANIZER