Multi-Step Delegation Process Guide

Objective: Delegate the process so the advisor is confident that the team member is competent in handling the process, and that the team member has time reminders set up so continuity is in place.

Delegator: Advisor Name

Delegatee: Team Member Name

Step 1: The first time the process is performed, the delegator will show the team member how to do the job while the team member takes notes on this delegation template

Step 2: The second time the team member completes the process (following their notes) while the delegator watches and has the team member adjust notes as needed.

Step 3: The team member completes the process on their own (following their notes) and shows the delegator the finished work. Team member verbally tells the delegator how they did it so they can check notes for accuracy.

Step 4: The team member will finalize notes and save to an agreed upon location.

Step 5: The team member will add timely follow-ups to complete the process to their CRM and advise delegator what was entered.

Step 6: The Team member will continue to complete the process and will show results to the delegator for review until the delegator feels confident that they no longer need to review the work.

Step 7:

Step 8:

Step 9:

Step 10: