

Delegation Discussion Checklist

A. Context		Notes
<ol style="list-style-type: none">1. Big picture: Client's goals? Risks?2. For this task: biggest concerns? Why it matters?3. Project timeline, and how this task fits in?4. Dependencies: Who is waiting/relying on this task? Why?	<ul style="list-style-type: none">•	

B. Steps		Notes
<ol style="list-style-type: none">1. First step (e.g., "send me an outline")2. Granular timeline (dates for milestones and check-ins)3. Deliverable: expected format and formality level	<ul style="list-style-type: none">•	

C. Guardrails		Notes
<ol style="list-style-type: none">1. Time expected (e.g., "10-15 hours")2. Resources available to help3. Scope constraints (e.g., issues to avoid, decisions already made)4. Release valves (i.e., what if we can't work within guardrails? Reduce scope? Ask for more time?)	<ul style="list-style-type: none">•	

D. Prioritization		Notes
<ol style="list-style-type: none">1. Discuss other priorities within this matter2. Discuss priorities outside this matter3. Expected personal time or PTO constraints4. Personal priorities and goals	<ul style="list-style-type: none">•	