

# project assignment worksheet

## How to use this tool

Delegation is the key to management. It should never be seen as task-avoidance. It is an opportunity to use your own time more effectively and to motivate and manage your staff. Try to use basic delegation techniques on a daily basis. It needn't be a big deal.

Take time to work out exactly what the job or the responsibility is. Be able to explain it clearly. It is useful to use the popular acronym, SMART, to keep the process focused. It must be:

- **Specific** – able to be clearly articulated and explained
- **Measurable** – easily monitored and assessed on completion
- **Agreed** – both parties must buy into the project and why it is being done
- **Realistic** – unrealistic targets will not work; required skills and resources must be available
- **Timebound** – there must be a specific finish date, and if necessary, periodic milestones.

Using the attached worksheet is a simple means of chronicling key assignments. The simple notion of Who, What, Why and When is a quick and easy way to assemble your thoughts, regardless of how big or small the matter is. You don't need a formal worksheet: just jot down the four Ws as headings.

Be clear what your role will be – manager, mentor, assistant, overseer?

Give the person the full responsibility for the result. While you may suggest the appropriate processes involved, don't curb the person's natural ability to contribute their own personal skills and approach to the project. You might be surprised, and most will rise to the level you have empowered them to reach.



[alanhargreaves.com](http://alanhargreaves.com)

# project assignment worksheet

<b>Task</b>	<p>Define the project or task and give it a sensible title.</p> <p>Check that it is SMART (Specific, Measurable, Agreed, Realistic, Timebound)</p>
<b>Who</b>	<p>Remember that effective delegation not only frees management time, it also allows the manager to manage.</p> <p>Who is the best person to handle this task? Do they have the right skills? Is further training required? If so, what? Does it fit with their level of responsibility? Does it “stretch” them? This is often an excellent way of encouraging or challenging people. But be careful. Some people are not in need of stretching.</p>
<b>What</b>	<p>In very precise terms, what exactly needs to be done? Are there established ways of doing this within the firm, or within the industry?</p> <p>What are the criteria for the assignment’s success? Explain these to the assignee. All employees will do things differently. Are there any specific items you want done in a certain way?</p>
<b>Why</b>	<p>Why is it important that this task be done? How is it good for the firm or the team? Explain this to the employee. Why have you chosen them? Let them know. Will this enhance their role in the firm? How will it help you?</p> <p>The most effective delegation occurs where it not only contributes to the smooth organisation and running of the business, but also nurtures an inclusive culture in which all employees feel recognised and motivated.</p>
<b>When</b>	<p>When must the project be completed? Why? Explain this to the employee. How will it be monitored? Can the project form a useful part of their next performance appraisal?</p> <p>Diarise a time to check on progress. Stress that it is okay to ask for help. Agree on the completion date and diarise.</p>



# project assignment worksheet

Task	
Who	
What	
Why	
When	



# project assignment worksheet

**For more information, visit my website [www.alanhargreaves.com](http://www.alanhargreaves.com)**

Hi, I'm Alan Hargreaves. I specialise in simplifying complex business problems. In over 35 years as a business executive, I have never found an issue that cannot be addressed through identifying the essential but simple steps required to make any problem manageable. It might be your career, your firm, your team or your strategy. It doesn't matter. All hurdles can be lowered through dispassionate analysis, and all executives can embrace simple processes to take them forward. Using these techniques, I have helped hundreds of people through the various stages of their business or career development. It may be the challenge of taking on new responsibilities; it could be the task of managing a business you have created yourself; it may be handling a difficult team in the midst of major change. I use a straightforward combination of key principles to get results: collaboration, adaptation, simplification and action. You can contact me anytime at [alan@alanhargreaves.com](mailto:alan@alanhargreaves.com).



**[alanhargreaves.com](http://alanhargreaves.com)**