

THE DELEGATION TRUST FILTER™

Below is a list of criteria to assess delegation trust across your team. Along the top, capture the names of your teammates. Next to each trust criteria, score the person 1-5 based on the level of trust you have with each as it relates to delegating decisions; 1 being the lowest, 5 being the highest. Note down any examples that come to mind for you regarding activities at each level. When you're done, tally up the score at the bottom to assess the spectrum of trust you have for each team member. *If you need it, there's a completed form at the back of this document you can reference.*

	Name:	Name:	Name:	Name:	Name:
High impact, high risk decisions: financial or people related Example: _____					
Impactful to you directly: your time, energy or expenses Example: _____					
Day to day operational or departmental impact decisions Example: _____					
Impactful to others: their time, energy or expenses Example: _____					
Low impact, low risk decisions: basic task-level Example: _____					
Totals:					

KEY:

- 1: LOW
- 2: SOMEWHAT LOW
- 3: MODERATE
- 4: SOMEWHAT HIGH
- 5: HIGH

TRUST SPECTRUM SCORE TOTAL:

- 1-7: LOW LEVEL OF TRUST
- 8-14: SOMEWHAT LOW LEVEL OF TRUST
- 15-18: MODERATE LEVEL OF TRUST
- 19-21: SOMEWHAT HIGH LEVEL OF TRUST
- 22-25: HIGH LEVEL OF TRUST

Now that you have assessed the level of trust across your team, you can begin to take proactive steps to ensure they are empowered to support you with these decisions in the moment.

PROACTIVELY SETTING THEM UP FOR SUCCESS:

1. Do they have the authority and autonomy to make these kinds of decisions?
2. What tools or permissions do they need to make these kinds of decisions?
3. What information do they need from you to make these decisions?

Remember, sometimes incremental adjustments can still bring impact to your time and energy! Small steps like this help build trust over time which will shore you up in the most stressful moments of decision-making.

PRIMING THE PROCESS:

1. Can delegating this decision get you 80% of the same result if you had made the decision yourself?
2. Can delegating this decision get you 80% of the way there, leaving you with the final 20% of the decision making?
3. Can you slow or control the timing of the decisions that need to be made, or proactively create time via scheduled pulse meetings to lump the decisions into one block as much as possible?
4. Think about when you are at your sharpest? Can you structure your calendar with pulse meetings that occur during those times?
(hint, usually it's the morning!)
5. As your team comes to you with decisions, pause and ask them how they are thinking about it, before you answer. Feedback to them what you heard, and add context around how you'd be thinking about it to set them up for future decision making autonomy.

BONUS: If you find yourself having to make the same decisions over and over, it's time to delegate or automate that decision to someone else. Work with a team member to turn it into a process, have them shadow you, then you shadow them, then step out!

SAMPLE COMPLETED TOOL:

	Name: <i>Jim</i>	Name: <i>Sally</i>	Name: <i>Amy</i>	Name: <i>Scott</i>	Name: <i>Luke</i>
High impact, high risk decisions: financial or people related Example: <i>Firing, Budget cuts or adds</i>	5	4	1	2	3
Impactful to you directly: your time, energy or expenses Example: <i>Your calendar, booking your travel</i>	5	4	1	2	3
Day to day operational or departmental impact decisions Example: <i>reviewing contracts, committing to departmental resources</i>	5	5	3	4	3
Impactful to others: their time, energy or expenses Example: <i>assigning new responsibilities to team members</i>	5	5	4	4	4
Low impact, low risk decisions: basic task-level Example: <i>Selecting office supplies, ordering lunch</i>	5	5	5	5	5
Totals:	<i>25</i>	<i>21</i>	<i>14</i>	<i>17</i>	<i>18</i>

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