

TOPIC	
What is the training topic?	Are you the subject matter expert (SME) or did you select a topic from Source Content?
Delegation & Prioritization	SME

DEFINED BUSINESS GOAL AND PROBLEM	
Define the business that your sample relates to: What type of business is it? What industry is it a part of? What is the name of the business (fictional or real, if volunteering for a real company)?	
StratusEdge Technologies (fictional) Mid-sized Software as a Service company ~350 employees, with 45 middle managers	
What is the business goal for this training? What does success look like for the company?	
To improve team productive and manager effectiveness by equipping managers with skills and tools to delegate tasks appropriately and prioritize responsibilities effectively. This should decrease manager task load by 30%, have a 15% improvement of on-time project completion, and a 10% increase in team engagement.	
What is the business problem (gap), that when solved or closed, would help the organization reach the above goal? In other words, WHY is the goal not being met right now?	
StatusEdge Technologies has grown rapidly over the last three years, resulting in a large number of internal promotions. Many of the new managers are struggling to effectively delegate and prioritize. This is resulting in missed project deadlines, manager burnout due to task hoarding, and team members feeling underutilized or unclear on responsibilities.	

AUDIENCE	
Who are the primary learners (audience) that will be taking the training? Be specific.	
Newly promoted team leads and mid-level managers in departments like product development, customer success, marketing, and operations.	
What are the basic demographics of your primary learners?	
Primarily learners consist of newly promoted team leads and middle managers. The learners exist in a hybrid work setting (60%	

remote, 40% in-office). All have bachelor's degrees or higher, 2-5 years at StratusEdge, high tech proficiency, age ranged 28-45.

What are your learners' prior knowledge/skill level?

Learners are comfortable and familiar with Asana and Jira as well as Slack and Zoom. Understand concepts like deadlines, dependencies, and workload distribution at a surface level. Managers are aware of time constraints. They have had minimal formal management training.

(Current State) What is currently happening with the target audience that needs to change? Before learners take your training, what are they doing, or not doing successfully?

Currently managers are task hoarding (taking on too many tasks themselves), are ineffective in delegating tasks/assignments, poor at prioritizing tasks, and there is limited team development.

(Future State) What should the target audience be doing? Once learners complete the training, what should learners be able to do successfully?

Managers should be able to delegate more strategically and confidently. Delegated tasks should include clear instructions, context, and follow-up. Tasks are prioritized using a structured method.

CONTENT OUTLINE

ACTIONS NEEDED TO MEET GOAL

Directions	Action 1:	Action 2:	Action 3:	Action 4:
<i>List all of the actions that a learner would need to take for the business goal above to be achieved.</i>	Identify What to Delegate	Choose the Right Person	Communicate Clearly and Set Expectations	Prioritize Work Strategically
Directions	How Action 1 ties to the business goal:	How Action 2 ties to the business goal:	How Action 3 ties to the business goal:	How Action 4 ties to the business goal:
<i>State HOW these actions tie back to the business goal.</i>	By intentionally offloading appropriate tasks, managers reduce personal workload,	Assigning tasks to capable team members ensures faster, more efficient execution,	When expectations are well-defined, team members are more likely to complete work	Using a prioritization framework ensures managers and teams focus on what matters

	directly addressing task overload.	which helps improve project turnaround times.	accurately and on-time.	most, accelerating progress on key initiatives improving both delivery speed and team morale.
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LEARNING OBJECTIVES				
Directions	Terminal LO 1:	Terminal LO 2:	Terminal LO 3: (optional)	Terminal LO 4: (optional)
List all of the terminal learning objectives (LOs) that the learner will need to achieve to meet the business goal. Your sample should have 2-4 terminal LOs. Each LO should connect with the action that is in the corresponding column above.	Apply a delegation criteria framework to determine which tasks can and should be delegated to others.	Evaluate team member capabilities and availability in order to match the right person to the right delegated task.	Communicate delegated tasks with clear expectations.	Apply a prioritization model to strategically prioritize tasks.
Directions	Are there any enabling LOs that support terminal LO 1? (optional)	Are there any enabling LOs that support terminal LO 2? (optional)	Are there any enabling LOs that support terminal LO 3? (optional)	Are there any enabling LOs that support terminal LO 4? (optional)
If there is an enabling LO that supports the terminal LO, list those here. Not all terminal LOs may have a supporting enabling LO. Terminal LOs may stand on their own but enabling LOs should not.	- Define the purpose and benefits of delegation -Distinguish between tasks that must be retained v. delegated -Use a delegation filter to categorize tasks -Reflect on recent tasks	-Identify key criteria for selecting a team member -Use a team skills matrix or profile tool to assess strengths and development needs -Match task complexity to employee readiness	-Identify the 4 key components of a successful delegation conversation: context, task, timeline, and authority -Draft a delegation message using a structured template or	-Explain the purpose of task prioritization and its impact on team performance -Describe how to use the Eisenhower Matrix or Impact/Effort Grid -Sort a list of tasks into priority categories

	completed and classify at least three as high-potential for delegation	using a situational delegation approach -Analyze a scenario and choose the most appropriate person to delegate a specific task to.	script. -Differentiate between vague v. specific delegation language -Practice giving verbal or written delegation instructions in a simulated scenario	using a provided model -Identify common prioritization pitfalls and strategies to overcome them.
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CONTENT OUTLINE				
Directions	Subtopic 1:	Subtopic 2:	Subtopic 3 (Optional):	Subtopic 4 (Optional):
List the subtopics (categories of chunked content) in a meaningful order. Each subtopic should connect with the LO and the action that are in the corresponding columns above.	-Role & Value of Delegation -What tasks should (and should not) be delegated) -Delegation Criteria and Filtering Frameworks -Self-Audit: Analyzing Your Current Task Load	-Why matching matters -Criteria for selecting the right team member -Using tools to evaluate team strengths -applying situational delegation	-Cost of Unclear Delegation -Four Key Elements of Effective Delegation Communication -How to Set Authority Levels and Boundaries -Using a delegation conversation template or script	-Why prioritization matters -Common pitfalls and biases -introduction to prioritization frameworks -Applying prioritization framework to real work
Directions	Information / details:	Information / details	Information / details	Information / details
Outline the information that each subtopic will cover. Avoid going beyond the scope of the LOs. Only include info that is needed to achieve the LOs. This section needs some detail, not just a couple of words.	-Role & Value of Delegation - Why managers struggle to delegate - Benefits of delegation - Connection between	-Why matching matters - Risk of poor matches - Underperformance, rework, time lost - Damaged	-Cost of Unclear Delegation - Common outcomes of unclear delegation - Real-world examples - Managers role in	-Why prioritization matters - Consequences of poor prioritization - Wasted time - Missed deadlines

<i>Example: If your content involves 5 steps of a process, you must write out all 5 steps. If it's three characteristics, all three characteristics must be named.</i> <i>The information should connect with the action, LO's, and subtopic listed in the corresponding columns above.</i>	delegation and leadership • When not delegating becomes a bottleneck -What tasks should (and should not) be delegated) • Categorize of tasks retaining by managers ◦ Strategic-decision making ◦ Long-term planning ◦ Sensitive personnel issues (HR matters, PTO request, FMLA or medical documentation, etc) ◦ High level of confidentiality (performance reviews, non-disclosures, special projects that are not revealed to entire company) ◦ High visibility presentations,	trust • Benefits of good matches ◦ Higher quality outcomes ◦ Increased engagement ◦ Development of individual capabilities and ownership -Criteria for Selecting the Right Team Member • Key criteria to assess ◦ Skills and Knowledge ◦ Capacity ◦ Interest ◦ Readiness • Common Mistakes ◦ "Go-to" person ◦ Fear of burdening others ◦ Base only on speed or convenience -Using tools to evaluate	clarity -Four Key Elements of Effective Delegation Communication • Context - provide rationale for work and how it fits into company priorities ◦ Ex - An updated KPI report is needed for our directors to make decisions at their meeting on Thursday. You will do the research and prepare the draft for me. • Task - specific details on the task and objectives of delegated work ◦ Ex - Prepare a draft of the KPI report for Thursday's directors' meeting. Please include appropriate visuals and updates on all	◦ Burnout • Benefits of strategic prioritization ◦ Focus on high-impact outcomes ◦ Clarity in decision-making ◦ Increased trust from senior leadership • Links to business outcomes ◦ Faster turnaround ◦ Reduced manager overload ◦ Increase team engagement -Common prioritization pitfalls and biases • Typical traps ◦ Urgency bias ◦ Task addiction ◦ First in, first out • Cognitive biases -Introduction to prioritization
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	talking points, etc that have large impact for business ○ Big impact tasks (all hands meetings, town halls, quarterly reviews, strategic planning, board meetings) ● Types of tasks that are often great for delegation ○ Repetitive admin work (weekly KPI updates, monthly scheduling,) ○ Process execution (weekly meeting agendas, processes) ○ Research, drafting, prep, etc. (typically in the drafting stages with final being approved by	team strengths ● Team Skill Matrix ● Delegation Readiness Chart ● Applying tools -Applying Situational Delegation ● Understanding task complexity ○ Tech demands ○ Time ○ Interdependencies ● Situational delegation model ○ Direct ○ Coach ○ Support ○ Delegate fully ● Choosing your leadership style based on readiness	KPIs ● Timeline - a precise due date/clear deadline and amount of time available for allocating to the task ○ Ex - Please have this completed by 5pm on Tuesday the 21st. You should probably spend around 10-15 hours on this task. ● Authority - clarity on what decisions the individual is permitted to make and which require approval ○ Ex: When drafting the report, you must utilize the provide template; however, you can decide on which graphics to utilize without	frameworks ● Overview fo two frameworks ○ Eisenhower Matrix ○ Impact/Effort Grid ● Breadkown of each quadrant, grid ● When to use each model -Applying framework ● Walkthrough example ○ Sample task mapped onto framework ○ Explanation of categorization ● Activity ○ Map 8-10 tasks
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	managers) ■ Ex - draft blog posts, draft memo, draft social media posting, draft dashboards ○ Stretch assignments to support development (with proper guidance, guidelines) ● Delegation of “Grey” areas ○ Tasks that could be delegated with guidance or training ○ Tasks that might become delegate ready over time ● Common myths of delegation -Delegation Criteria and Filtering		approval -How to Set Authority Levels and Boundaries ● 5 Levels of Delegation Authority ○ Do exactly what I say ○ Research and report back ○ Make a recommendation ○ Make the decision, inform me ○ Make the decision, no need to report ● Choosing the right level based on risk and readiness ● Communicating boundaries clearly -Using a delegation conversation template or script ● Overview of template based on 4 key elements ● When to use template ● Examples	
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	Frameworks • Introduction to a delegation filter or checklist ◦ Is this tasks necessary for me to complete personally? ◦ Does this task help someone else grow? ◦ What's the risk if this task is delegated imperfectly? ◦ How much time would it take to explain or train? • Sample Frameworks ◦ 5Rs (Routine, Repetitive, Ready, Right Fit, ROI) ◦ Time-Impact -Risk Matrix			
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ASSESSMENT				
Directions	Question:	Question:	Question:	Question :

<i>Write each stem as a performance-based scenario question set in a realistic context.</i> <i>The question should connect with the action, LO, and content in the corresponding columns above.</i> <i>Ask yourself, “Can this assessment question be answered with the content written above in this template?” No matter what content you include when you develop the course later, if there is not enough content provided in this template to answer the question, you will need to expand the content above.</i>	Scenario: You are reviewing your upcoming week. Below is a list of five tasks currently on your to-do list. Using the delegation filter provided in the course (considering urgency, complexity, strategic value, and development potential), select two tasks that should be delegated. Task List 1. Finalize the Q3 department strategy presentation for executive leadership. 2. Schedule 1:1 meetings for all team members next month. 3. Review and approve time-off requests for the upcoming holiday. 4. Compile weekly KPI data from dashboard reports and send	Scenario: You need to delegate a task to lead a client onboarding presentation for a mid-size customer. The task requires: • Comfort with public speaking • Understanding of client onboarding processes • Availability to prepare over the next 2 days • Ability to represent your team professionally Below is a summary of your team members. Based on the criteria above, select the best person to delegate this task to. Team Member Profiles A. Jordan • Strong communication skills	Scenario: You’ve just assigned a task to Jordan, asking him to draft the first version of your team’s monthly performance report. Below is your message to him: <i>“Hey Jordan, can you take a stab at the performance report this month? Thanks.”</i> Question: What missing information should you also include in this delegation message that would help Jordan complete the task successfully? A. A clear deadline for when the report is due B. An explanation of why the task is important C. A detailed outline of Jordan’s career goals D. Clarity on what decisions Jordan is allowed to make	Instructions: You are reviewing your weekly task list using the Eisenhower Matrix (Urgent vs. Important). Match each task to the appropriate quadrant of the matrix based on its urgency and importance. Task List: 1. Submit this quarter’s team goals to leadership—due tomorrow. 2. Respond to a non-critical internal email about a scheduling tool. 3. Outline your department’s 6-month strategy plan. 4. Update the formatting of a presentation that was already delivered. Eisenhower Matrix Options: A. Do Now (<i>Urgent &</i>
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	to Ops. 5. Draft talking points for your department's segment in the company all-hands meeting.	• Brand new to the onboarding process • Currently available • Eager to take on new challenges B. Maya • Deep knowledge of onboarding • Strong internal presentation skills, but struggles with external client interactions • Has limited time this week due to a cross-functional project C. Leo • Experienced with onboarding • Has led three successful client presentations in the past • Confident speaker, great with clients • Available for prep time and delivery	E. A thank-you or expression of appreciation	<i>Important)</i> B. Schedule <i>(Important but Not Urgent)</i> C. Delegate <i>(Urgent but Not Important)</i> D. Eliminate <i>(Not Urgent & Not Important)</i>
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		D. Alina • Skilled in data analysis and process design • Prefers behind-the-scenes work • Minimal client-facing experience • Very available this week												
Directions	Correct Response:	Correct Response:	Correct Response:	Correct Response:										
<i>List the correct response to each question.</i>	Task 2: <i>Schedule 1:1 meetings</i> Task 4: <i>Compile weekly KPI data</i> <i>Feedback</i> • Task 2 is administrative, recurring, and has low risk—ideal for delegation to an assistant or team coordinator. • Task 4 is process-based and can be systematized or handed off to a	Correct Answer: C. Leo <i>Feedback</i> Leo has the complete package: client-facing experience, onboarding knowledge, and availability. Delegating to Leo ensures quality delivery, meets the timeline, and sets the team up for success.	Correct Answers: A, B, and D A. A clear deadline – <i>Correct.</i> Without a specific due date, Jordan may not prioritize the task appropriately. B. An explanation of why the task is important – <i>Correct.</i> Providing context helps Jordan understand how this work supports team goals D. Clarity on decision-making	<table><tr><th>Task</th><th>Matrix Quadrant</th></tr><tr><td>1</td><td>A. Do now</td></tr><tr><td>2</td><td>C. Delegate</td></tr><tr><td>3</td><td>B. Schedule</td></tr><tr><td>4</td><td>D. Eliminate</td></tr></table>	Task	Matrix Quadrant	1	A. Do now	2	C. Delegate	3	B. Schedule	4	D. Eliminate
Task	Matrix Quadrant													
1	A. Do now													
2	C. Delegate													
3	B. Schedule													
4	D. Eliminate													

	junior team member for growth; manager's review can happen later if needed.		authority – <i>Correct.</i> Jordan needs to know whether he can structure the report freely or must follow exact guidelines.	
Directions	Distractors (Incorrect Responses)	Distractors (Incorrect Responses)	Distractors (Incorrect Responses)	Distractors (Incorrect Responses)
List the distractors for each question. These distractors should be viable responses, based on the content you have included above, and not so unrelated that they are obviously wrong.	• Delegating Task 1 (Finalizing the Q3 Strategy Presentation) Feedback: This task is high-impact, strategic, and tied to executive visibility. It's best retained by the manager, though components (e.g., slide formatting) may be delegated. • Delegating Task 3 (Approving Time-Off Requests) Feedback: This task may appear administrative	• Jordan <i>Incorrect:</i> Jordan is promising and available, but lacks onboarding knowledge. Delegating now may require too much support and risk a poor client experience. • Maya <i>Incorrect:</i> Maya knows the content but isn't confident with clients and is overextended. Delegating to her risks timeline delays and presentation quality.	• C. Jordan's career goals – <i>Incorrect.</i> While important for development, this isn't a required element for task clarity. • E. Expression of appreciation – <i>Incorrect.</i> While nice to include, it's not essential for setting expectations.	• Task 1 → A (Do Now) <i>Correct: This is both time-sensitive and essential to team performance tracking.</i> • Task 2 → C (Delegate) <i>Correct: This is a minor task that should not take up manager time.</i> • Task 3 → B (Schedule) <i>Correct: Strategic planning is high-value but not immediately due—block time for it.</i>

	but carries HR and policy implications. It's a decision best kept at the manager level. • Delegating Task 5 (Drafting Talking Points for All-Hands) Feedback: This is a high-visibility communication item that reflects your leadership voice and departmental strategy—delegation could dilute key messages.	• Alina <i>Incorrect:</i> While highly available, Alina lacks client-facing experience and may be uncomfortable in this role. This assignment is a poor fit for her strengths.		• Task 4 → D (Eliminate) <i>Correct:</i> This adds no current value and can be removed from your priority list.
Directions	Additional Question:	Additional Question:	Additional Question:	Additional Question :
Include additional performance-based scenario questions here. Note: You need to have a minimum of four questions, so a couple of your LOs may have more than one question. Please fill in the additional questions in the appropriate column under the corresponding LO. It is ok if some boxes are left blank in this section, as long as you	Scenario: You're leading a busy week with competing demands. Review the list of tasks below and select all that are appropriate to delegate to others on your team. Assume your team members have baseline functional competence but varied experience			

have at least four total questions.

levels.

Task List

A. Conduct a final review of your department’s annual budget before submission to the CFO.

B. Organize agenda items and take notes for the weekly team meeting.

C. Write the first draft of a blog post on your team’s recent project success.

D. Meet with an underperforming team member for a feedback conversation.

E. Pull and format monthly performance data into the standard dashboard report.

Directions

Correct Response:

Correct Response:

Correct Response:

Correct Response:

If you have an additional question for this LO, list

B, C, and E

the correct response to each question.

- **B. Weekly meeting logistics** –
Correct. This is a recurring, process-based task ideal for delegation to a team coordinator or junior team member.
- **C. First draft of a blog post** –
Correct. A great opportunity for a team member to contribute creatively and gain visibility, especially with review guidance from you.
- **E. Dashboard formatting** –
Correct. This is routine, low-risk, and can easily be handled by a team member with basic reporting skills.

Directions

Distractors (Incorrect Responses)

Distractors (Incorrect Responses)

Distractors (Incorrect Responses)

Distractors (Incorrect Responses)

If you have an additional question for this LO, list the distractors for each question.

- **A. Final budget review –**
Incorrect. This is a high-visibility, strategic responsibility that should be retained by the manager.
- **D. Performance feedback conversation –**
Incorrect. This is a sensitive responsibility that should not be delegated; it's the manager's role to lead it.

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