

MAKE WINNING EASY · MAKE LOSING FUN

# Get CLEAR on How to Delegate

*A Mastermind Workshop Exercise*

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

*Pick one task you keep doing yourself that someone else could do. Run it through the CLEAR framework before you hand it off. The first time will take longer than just doing the task. That's the tuition. Pay it once and you buy back hours every week after.*

**1**

## The CLEAR Framework

*A reference before you start*

<b>C</b>	<b>Context</b>	<i>Why does this matter?</i>
<b>L</b>	<b>Limits</b>	<i>What are the boundaries?</i>
<b>E</b>	<b>Expectations</b>	<i>What does success look like?</i>
<b>A</b>	<b>Accountability</b>	<i>Who owns what?</i>
<b>R</b>	<b>Resources</b>	<i>What's needed to succeed?</i>

**2**

## Define the Task

*Pick one thing only*

### THE TASK I WILL DELEGATE

*What I want done, in one sentence:*

.....

.....

*Who I will delegate it to:*

.....

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## Run It Through CLEAR

Fill in each field before the handoff

C

### CONTEXT

Why does this matter? What's the bigger picture this fits into?

*Example: We're behind on response times and this is hurting customer trust.*

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L

### LIMITS

What are the boundaries? Budget, time, scope, what's off-limits?

*Example: Budget of \$500. Must use existing vendors. Don't touch the website copy.*

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E

### EXPECTATIONS

What does success look like? Be specific enough that the person knows when they're done.

*Example: A written response to every ticket within 24 hours, with a tracking spreadsheet I can review weekly.*

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# A

## ACCOUNTABILITY

Who owns what? When will you check in? What gets your approval before it goes out?

*Example: You own all replies. I approve any refund over \$200. We meet Mondays at 10 a.m.*

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# R

## RESOURCES

What does this person need to succeed? People, tools, access, training, money.

*Example: Login to the help desk, a shared doc of past responses, a list of three teammates to ask for help.*

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## THE HANDOFF

When and how will I have this conversation (in person, call, written)?

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First check-in date:

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**AFTER ACTION REVIEW**

*Return to this page once the task is done.*

What went better than you expected?

.....  
.....

What would you make CLEARer next time?

.....  
.....

*Early inefficiencies are tuition. Pay them, and you build a team that multiplies the difference you can make.*