

Effective Delegation: To People and to AI

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Create room to lead by deciding what stays with you, handing off work clearly, and following progress without constant check-ins.

September 22, 2026

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Who it is for

Leaders deciding what to keep, delegate, and assign to AI.

Inside this playbook

6 prompts, shorter versions, and worked practice scenarios.

[Open the online playbook](#)

The recorded session

Watch the Learning Lab.

Follow the session, then use the playbook below with your own task list.

[Watch replay on Vimeo](#) ^[1]

What to take into your work

1. Use your judgment to decide what stays with you. A task list gives AI a starting point; you make the final call.
2. Define the outcome, authority, and success criteria before handing off the work.
3. Agree on milestones, updates, and escalation points so everyone knows when to check in.

Start with the decision

Keep. Delegate. Offload.

Look at your actual calendar and recurring responsibilities. Give each task a clear owner and decide how you will review the result.

Keep

Work that requires your judgment, relationships, or authority.

Performance conversations, strategic decisions, and sensitive negotiations.

Delegate

Work someone on your team can own or learn to do with the right support.

Running a meeting, drafting a report, or managing a vendor relationship.

Offload to AI

Structured work and drafts that you can review before using.

Meeting agendas, status summaries, data formatting, and first-draft SOPs.

Use the first three prompts as a sequence.

Audit your task list, choose one handoff, and set up a simple way to follow the work. The remaining prompts help with the situations that come next.

Using the prompts

Copy a prompt into your approved AI tool, replace the bracketed inputs, and answer its questions. The practice scenarios use manufacturing and quality-team work; adapt the role and context to your own situation. Use only information your organization permits in that tool.

Role → Context → Request → Question

Give AI a perspective, the relevant background, the result you need, and a way to ask for missing information. Keep useful prompts so you can repeat the work.

Core sequence · Audit the work

01

The Task Audit & Delegation Classifier

Turn your task list into a delegation plan. Decide what needs your judgment, what someone else can own, and where AI can help with a draft.

Bring: Your next two weeks of work, recurring responsibilities, team roles, and constraints.

Check: Review every classification. Time savings are estimates to test against your own work.

Full prompt

PROMPT TO COPY
ROLE You are a leadership productivity coach who specializes in helping mid-level and senior leaders in the automotive and manufacturing industry delegate effectively. You

PROMPT TO COPY

understand matrixed organizations, plant operations, and the difference between tasks that require human judgment and tasks that AI can accelerate.

CONTEXT

I am a leader who is doing too much myself. I need help identifying what I should keep, what I should delegate to my team, and what I can offload to AI tools. I want to stop being the bottleneck without dropping quality.

REQUEST

Review my task list below and classify each item into one of three categories:

1. **KEEP** — Only I can do this (requires my authority, judgment, or relationships)
For each: Explain briefly **WHY** this stays with me.
2. **DELEGATE TO A PERSON** — Someone on my team can own this
For each: Explain **WHO** should own it (by role type, not name), **WHY** they can handle it, and what support they need to succeed.
3. **OFFLOAD TO AI** — AI can draft, structure, or accelerate this
For each: Explain **WHAT** AI can do, write a ready-to-use prompt I can paste into my AI tool, and note what I should review before using the output.

After classifying all tasks, provide:

- A summary of how my time shifts (estimated hours reclaimed per week)
- The single highest-impact delegation I should make first
- One warning: what am I most likely to pull back instead of letting go?

FORMAT

Present results as a table:

| Task | Classification | Reasoning | Action / Prompt |

Then provide the summary section below the table.

IMPORTANT

- Do not invent tasks.
- If a task is ambiguous, ask before classifying.
- Assume I am competent and ambitious — I just haven't been taught how to let go strategically.

[PASTE YOUR TASK LIST — calendar items, recurring responsibilities, or a brain dump of everything on your plate]

Shorter version

Short prompt

PROMPT TO COPY

I will paste a list of my tasks and responsibilities.

For each task, classify it as:

1. KEEP (only I can do this — explain why)
2. DELEGATE (someone else can own this — suggest the role type and what support they need)
3. OFFLOAD TO AI (AI can draft or accelerate this — write a short prompt I can use)

After classifying, tell me:

- Which single delegation would free up the most time
- What I'm most likely to pull back instead of letting go

Be concise and specific.

[PASTE TASK LIST]

Practice example: A quality manager's two weeks

Use this scenario with the full prompt above, or replace it with your own work context.

Practice example

PROMPT TO COPY

I manage a quality engineering team of 8 at a Tier 1 stamping and assembly supplier. 300 employees, two shifts, stamped structural assemblies for two OEMs. Here is everything on my plate for the next two weeks:

- Daily 7 AM production quality huddle (30 minutes)
- Weekly customer quality report to our largest OEM, due Friday 3 PM (90 minutes to build)
- PPAP submission review for the 2028 crossover program, 14 part numbers (about 6 hours total)
- Monthly scrap trend deck for the plant manager (2 hours)
- Interviews for the open SQE role, two candidates scheduled
- Approving every customer 8D response before submission (3 to 4 per week, 45 minutes each)
- Rebuilding the layered process audit schedule for Q4
- One-on-ones with all 8 direct reports (30 minutes each)
- Training matrix update for the IATF surveillance audit in November
- Chasing three suppliers on overdue corrective actions (about 2 hours a week of calls and emails)
- Booking travel for the October customer audit

PROMPT TO COPY

- Writing the weekly team recognition post for the plant TV screens
 My AI tools: licensed Microsoft Copilot through our M365 account. Company policy allows internal data in Copilot, nothing proprietary in free public tools.

Core sequence · Write the handoff

02

The Delegation Brief Generator

Give the person receiving the work a clear outcome, the authority to act, and a shared definition of done.

Bring: The task, the person or role taking it on, deadlines, decision limits, and examples of good work.

Check: Read the brief as if you were receiving it. Make sure it explains which decisions are theirs and which come back to you.

Full prompt

PROMPT TO COPY

ROLE

You are a leadership coach who helps managers write clear, effective delegation briefs. You specialize in automotive and manufacturing environments where unclear handoffs cause rework, missed deadlines, and frustrated teams.

CONTEXT

I am delegating a task to someone on my team. I want to set them up for success with a clear brief that defines the outcome, gives them authority, and prevents the back-and-forth that wastes both of our time.

REQUEST

Based on my description of the task, create a Delegation Brief with these sections:

1. OBJECTIVE

What does "done" look like? Define the specific outcome, not just the activity.

2. CONTEXT

Why does this matter? What's the bigger picture this task connects to?

3. AUTHORITY & BOUNDARIES

What decisions can they make on their own?

What requires my input before proceeding?

PROMPT TO COPY

What budget, resources, or tools are available?

4. SUCCESS CRITERIA

How will we both know this was done well?
Include measurable or observable indicators.

5. TIMELINE & MILESTONES

When is it due?
Are there intermediate check-in points?

6. CHECK-IN CADENCE

How and when should they update me?
What format? (Quick message, email, 5-minute standup?)

7. SUPPORT AVAILABLE

Who else can help if they get stuck?
What resources or examples exist?

CONSTRAINTS

- Keep the brief to one page.
- Use clear, direct language.
- Do not over-engineer — this should feel like a conversation guide, not a contract.
- Adjust formality based on the relationship and task complexity.

QUESTION

Please ask me about the task I'm delegating, who I'm delegating it to, and any constraints before generating the brief.

Shorter version

Short prompt

PROMPT TO COPY

I am delegating this task to a team member:
[DESCRIBE THE TASK]

Create a short delegation brief with:

1. Objective — what "done" looks like
2. Authority — what they can decide vs. what needs my input
3. Success criteria — how we'll know it was done well
4. Timeline — when it's due and any check-in points
5. Support — who can help if they get stuck

Keep it to one page. Clear and direct.

PROMPT TO COPY

Practice example: Handing off the Friday customer report

Use this scenario with the full prompt above, or replace it with your own work context.

Practice example

PROMPT TO COPY
The task: our weekly customer quality report to our largest OEM. Due every Friday by 3 PM. It covers PPM trend, open 8Ds with status, containment actions, and upcoming PPAP milestones. Data comes from our QMS dashboard and the customer portal. Takes 90 minutes to build. I am delegating it to my senior quality engineer. Five years in the role, knows the data cold, built half the dashboard queries, but has never owned the customer-facing version. Strong analyst; the writing tends to run too technical for the customer's purchasing readers. Constraints: for the first month I review before it goes to the customer. After that they own the send and I get a copy. They can pull any data and contact process engineers directly. Anything involving a customer complaint older than 30 days, or anything touching special status, comes to me before it goes in the report. The customer SQE is particular about format and the template is locked. Goal: full ownership within a month, without the customer noticing a handoff happened.

Core sequence · Follow the work

03

The Accountability System Builder

Build a simple tracker and agree on the signals that call for an update. Use milestones and risk flags to stay informed.

Bring: Delegated tasks, owners, due dates, current tracking methods, and the deadlines that cannot move.

Check: Keep the tracker easy enough to maintain. Agree on escalation points with the people doing the work.

Full prompt

PROMPT TO COPY

ROLE

You are a leadership operations coach who helps managers maintain visibility across delegated work without micromanaging. You specialize in automotive and manufacturing environments where leaders manage cross-functional teams, shifting priorities, and high-stakes deadlines.

CONTEXT

I have delegated several tasks to my team. I want to stay informed and maintain quality without:

- Constantly asking for updates
- Pulling work back when I get nervous
- Creating more meetings
- Making my team feel watched

REQUEST

Based on the delegated tasks I describe, build me a lightweight accountability system that includes:

1. DELEGATION TRACKER

A simple table I can maintain:

| Task | Owner | Due Date | Last Update | Status | Next Milestone | Risk Flag |

2. CHECK-IN TRIGGERS

Define when I should check in (not on a schedule, but based on signals):

- Milestone reached
- Deadline approaching (how far in advance?)
- Risk flag raised
- No update received in X days
- Scope change or blocker identified

3. STATUS UPDATE TEMPLATE

A short template my team can use to update me (async, not a meeting):

- What's done since last update
- What's next
- Any blockers or decisions needed
- Confidence level (green / yellow / red)

4. ESCALATION CRITERIA

Define clearly when the task should come back to me:

- Scope changes beyond original authority
- Timeline at risk by more than X days
- Quality concern that affects customer or leadership visibility
- Budget impact beyond defined threshold

5. TRUST-BUILDING LANGUAGE

PROMPT TO COPY

Give me 3–5 phrases I can use when checking in that communicate trust, not surveillance:

Examples that show "I'm here to support" not "I'm checking up on you."

CONSTRAINTS

- Keep the system simple enough to maintain in 15 minutes per week.
- Avoid creating new meetings. Favor async updates.
- Design for a real team, not a theoretical one.

QUESTION

Please ask me about my team size, the tasks I've delegated, and how I currently track work before building the system.

Shorter version**Short prompt****PROMPT TO COPY**

I have delegated these tasks to my team:

[LIST DELEGATED TASKS WITH OWNERS AND DUE DATES]

Create a simple accountability system:

1. A tracker table (task, owner, due date, status, next milestone, risk flag)
2. When I should check in (based on signals, not a fixed schedule)
3. A short status update template my team can use (async, not a meeting)
4. When the task should come back to me (escalation criteria)
5. 3 phrases I can use when checking in that build trust, not pressure

Keep it simple. I want to maintain this in 15 minutes per week.

Practice example: Tracking five handoffs without meetings

Use this scenario with the full prompt above, or replace it with your own work context.

Practice example

PROMPT TO COPY

My team is 8 quality engineers at a Tier 1 stamping supplier. I currently track delegated work from memory and sticky notes, which is why things surface only when they are already late. What I have delegated right now:

- Weekly customer quality report: senior quality engineer, every Friday 3 PM (new handoff, I review for the first month)
 - Q4 layered process audit schedule rebuild: quality systems engineer, due October 9
 - Supplier corrective action follow-ups, three suppliers: SQE, rolling, next milestone September 30
 - Training matrix update for the November IATF surveillance audit: quality coordinator, due October 16
 - Scrap data collection for the monthly trend deck: line quality techs, monthly by the 3rd
- I do not want more meetings. The team already says we meet too much. I want async updates, and I need to know early if the IATF prep slips, because that one has a hard external audit date behind it.

Go further · Keep ownership clear

04

The Reverse Delegation Shield

Respond when a task comes back to you. Check whether the person needs a decision outside their authority or support to make their own.

Bring: The original assignment, what came back, the person's authority, and what support they need.

Check: Make room for legitimate escalation. Coaching someone toward ownership still includes giving them useful support.

Full prompt

PROMPT TO COPY

ROLE

You are a leadership coach who helps managers respond to reverse delegation — when team members bring problems back instead of solving them.

CONTEXT

A team member has come to me with a question or problem about a task I delegated to them. I believe they can handle it, but they are looking for me to decide or do the work. I want to redirect them back to ownership without being dismissive or unhelpful.

PROMPT TO COPY**REQUEST**

Based on the situation I describe, help me:

1. Assess whether this is truly reverse delegation or a legitimate escalation
2. Draft a response that:
 - Acknowledges their concern
 - Redirects ownership back to them
 - Offers a thinking framework instead of an answer
 - Maintains the relationship and their confidence
3. Provide 3 coaching questions I can ask instead of giving the answer
4. Suggest a boundary I can set to prevent this pattern from repeating

TONE

Supportive and firm. I want them to feel empowered, not abandoned.

QUESTION

Ask me to describe the situation: what was delegated, what they came back with, and what I think they're capable of.

Shorter version**Short prompt****PROMPT TO COPY**

A team member brought this problem back to me instead of solving it:
[DESCRIBE THE SITUATION]

1. Is this reverse delegation or a legitimate escalation?
2. Draft a supportive response that redirects ownership back to them
3. Give me 3 coaching questions to ask instead of giving the answer
4. Suggest how to prevent this pattern from repeating

Tone: Supportive and firm.

Practice example: The question that came back

Use this scenario with the full prompt above, or replace it with your own work context.

Practice example

PROMPT TO COPY

Two weeks into the customer quality report handoff, my senior quality engineer stopped me on the floor: "The customer SQE emailed asking us to add a supplier-breakdown page to the Friday report. What do you want me to do?"
They have the data. Adding the page is squarely inside what we agreed they could decide. The locked-template concern does not apply here because the customer is the one asking for the change. I think they are checking with me because it is customer-facing and they are still nervous about owning the relationship.
What was delegated: the full weekly report, data through send, with first-month review by me.
What they came back with: a formatting decision the customer already requested.
What I believe they are capable of: handling this completely, including replying to the customer SQE directly.

Go further · Make an AI task repeatable

05

AI Task Offload: Prompt Writer

Turn a recurring task into a reusable prompt with clear inputs, output requirements, and quality checks.

Bring: The task, how often it happens, who uses the output, and the standard it needs to meet.

Check: Test it on real work before saving it. If the information does not explain a result, the output should say so.

Full prompt

PROMPT TO COPY

ROLE
You are an AI prompt engineer who helps leaders write clear, repeatable prompts for tasks they want to offload to AI tools. You specialize in automotive and manufacturing contexts and understand that leaders need outputs they can review quickly and use confidently.

CONTEXT
I have identified a recurring task that AI can help with. I need a well-structured prompt I can save and reuse each time this task comes up.

PROMPT TO COPY**REQUEST**

Based on my description of the task, create a reusable prompt that includes:

1. **ROLE** — Who should AI be for this task?
2. **CONTEXT** — What background does AI need every time?
3. **REQUEST** — What exactly should AI produce?
4. **FORMAT** — How should the output be structured?
5. **CONSTRAINTS** — What should AI avoid or watch for?
6. **QUALITY CHECK** — What should I review before using the output?

Also provide:

- A "fill in the blanks" version I can reuse with minimal editing
- One example of what good output looks like for this task

QUESTION

Ask me to describe the task, how often it recurs, who uses the output, and what quality matters most.

Shorter version**Short prompt****PROMPT TO COPY**

I want to offload this recurring task to AI:

[DESCRIBE THE TASK]

Write me a reusable prompt that includes:

1. Role for AI
2. Context it needs
3. What to produce
4. Output format
5. What to avoid
6. What I should check before using it

Make it fill-in-the-blanks so I can reuse it quickly.

Practice example: The monthly scrap narrative

Use this scenario with the full prompt above, or replace it with your own work context.

Practice example

PROMPT TO COPY

The recurring task: the narrative section of my monthly scrap trend deck for the plant manager. Due by the 5th every month. The data side is an Excel export from our QMS: scrap rate by line, by defect code, and by shift, with 13 months of trend. The part I dread is turning the numbers into the two-slide narrative: what moved, why, what we are doing about it, and what needs the plant manager's attention. Takes me two hours and still reads flat.

Frequency: monthly. The output goes to the plant manager, and it gets forwarded to the regional VP any month scrap is over target.

Quality that matters most: the narrative has to name the top three drivers with real numbers, connect each driver to an open corrective action or call out that none exists, and never overstate. If the data does not explain a move, the narrative should say "cause under investigation," not invent one.

Go further · Assess a larger workflow

06

The Agentic AI Task Identifier

Identify which tasks need one prompt and which might suit a workflow with several steps. Define the inputs, access, and review points first.

Bring: Tasks already identified for AI support, available tools, access limits, and your organization’s rules.

Check: Confirm that the suggested tool can do the work in your account. Review the output before anything is sent or a record is changed.

Full prompt

PROMPT TO COPY

ROLE
You are an AI workflow strategist who helps leaders identify which tasks can move beyond single-prompt AI usage into agentic AI workflows — where AI handles multi-step processes autonomously.

CONTEXT
I have a list of tasks I've already identified as "offload to AI." Some of these are simple one-step tasks (draft an email, summarize a document). But others could be handled by agentic AI — where I give AI a goal, point it at the right inputs, and it executes multiple steps without me guiding each one.

PROMPT TO COPY

I want to know which tasks are agentic-ready and which should stay as simple prompts.

REQUEST

Review my list of AI-offloadable tasks and classify each as:

1. SINGLE-PROMPT TASK — One input, one output. Paste and go.

For each: Confirm the prompt approach is sufficient.

2. AGENTIC-READY TASK — Multi-step. AI can research, build, iterate, and deliver.

For each:

- Describe the multi-step workflow AI would follow
- Identify what inputs or access AI would need
- Estimate time saved vs. doing it step-by-step yourself
- Note what you should review in the final output
- Suggest which tool handles this well (a Copilot agent, ChatGPT Work, a Claude Project or Skill, a Gemini Gem or scheduled action, based on the tools I tell you I have)

3. NOT READY — Requires too much judgment, live data access, or human interaction to automate.

For each: Explain why and suggest what would need to change.

After classifying, provide:

- The single highest-impact agentic workflow I should try first
- A step-by-step description of how to set it up
- What to watch for the first time I run it

QUESTION

Ask me for my list of AI-offloadable tasks and any relevant context about my tools, access, and comfort level.

Shorter version**Short prompt****PROMPT TO COPY**

Here are tasks I want AI to handle:

[LIST TASKS]

Classify each as:

1. SINGLE-PROMPT (one input, one output — simple)
2. AGENTIC-READY (multi-step — AI can run the whole workflow)
3. NOT READY (needs too much human judgment)

For agentic-ready tasks, describe:

PROMPT TO COPY

- The steps AI would take
- What inputs it needs
- Which tool to use
- What to review in the final output

Tell me which one to try first and how to set it up.

Practice example: Six offloads: which suit a larger workflow?

Use this scenario with the full prompt above, or replace it with your own work context.

Practice example**PROMPT TO COPY**

Tasks I have already decided to offload to AI:

1. First drafts of the weekly customer quality report narrative (data comes from our QMS dashboard)
2. The monthly scrap trend narrative from an Excel export
3. Meeting agendas for the daily quality huddle, built from yesterday's issues log
4. First drafts of supplier corrective action reminder emails (three suppliers, rolling)
5. Summarizing the weekly scorecard changes from the customer portal
6. Drafting the weekly team recognition post from the shout-outs my leads send me

My tools: licensed Microsoft Copilot through M365. Copilot agents are available; Copilot Cowork is not yet enabled by our IT. One of my engineers uses Gemini for non-confidential drafting.

Comfort level: I am fine reviewing everything before it goes anywhere. Nothing sends without me for now.

Company rules: internal data stays in Copilot. Nothing customer-proprietary in personal tools.

Put it to work

Choose one handoff this week.

1. **Run the task audit.** Use your calendar and task list for the next two weeks. Review the classifications and select one task to hand off.
2. **Write a brief and agree on ownership.** Use Prompt 2 to define the outcome, authority, support, and review points with the person taking on the work.
3. **Track the handoff.** Use Prompt 3 to record the owner, due date, next milestone, and any risk. Revisit the brief if the work keeps coming back to you.

Build from a prompt to a repeatable method.

Start with a task you can review easily. Save a useful prompt, add stable context and examples, and test it again. For work with several steps, define which inputs AI can use and where it needs your approval.

Recurring tracker reviews and check-in drafts can be candidates for a schedule if your tool supports it. Confirm the available access and run the process once before scheduling it. Keep sending and final decisions under your control.

Before you use the result

- Check the classification against your team's responsibilities and capabilities.
- Read the brief for a clear outcome, sufficient authority, and practical support.
- Verify important details in the original material, including dates, numbers, and commitments.

AI can help you think. It should not decide what is true for you.

Keep working with the material

Return to a useful prompt.

The full prompts, shorter versions, and practice scenarios are included above. Save the ones that help with your recurring work.

[Return to the task audit →](#) ^[2]

Links and resources

These links are clickable in the PDF. For a paper copy, use the numbered references below.

[1] <https://vimeo.com/1229660877/4c15baf279>

[2] <https://www.cherylthompson.net/learning-labs/2026-09-22-effective-delegation-to-people-and-to-ai#prompt-1>