

# Prepare to brief staff

Delegating effectively takes practice. Avoid mix-ups that cost you time and money by being clear what you expect from your staff.

Reflect on what you'd like people to do, and why. Once you've focused your thoughts, fill in the brief at the end of the worksheet and give it to your employee.

Being a good leader means taking people's feedback on board. So be prepared to adjust the brief after you've gone through it with your employee. Remember to keep a copy for your records.

**It's a good idea to do this worksheet when:**

- You're briefing a new employee.
- The task has a big impact on your business.
- An employee is underperforming.

**It will take 20-30 minutes.**

Use questions 1-5 to think about what to include in your brief.

# 1. What needs doing and why?

## The task

Explain the what, not the how, eg a report on new business streams from the last six months, including customers' region and age.

## Why it's important

How the task relates to your business goals, eg, tracking new sales will help us chase similar business and hit target.

## What you're looking for

What the result looks like, eg easy to read data we can discuss at our next team meeting and use to chase new customers.

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## 2. Task specifics

Fill in those that apply.

**Budget**

**Deadline**

### Tools to do the job

Will they need to use a certain piece of machinery? Will they need to download software or an app?

### Other constraints

Are there any politics? Do they need to keep someone updated on progress? Does the task rely on somebody doing something else?

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## 3. Who are you asking to do the task?

Use your answers to this question to think about:

- information and support your staff member will need
- how long they'll need to do the task.

### Skills and experience

Do they have skills that will help them, eg using technology or relating to people? Have they worked on a similar project, or is it their first time?

### Preferred work style

How do they like to work and have things explained, eg do they like working independently, or need regular check-ins? Do they need a lot of data or praise?

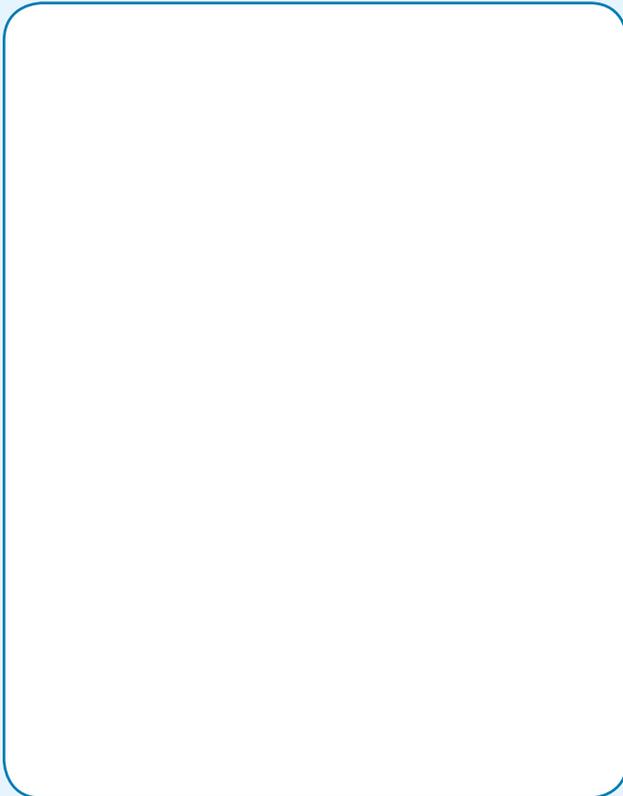
**Tip:** Get to know your team better by asking them to do a personality test.

Take a free Myers Briggs personality test at [16personalities.com](https://www.16personalities.com)

## 4. What information and support will they need?

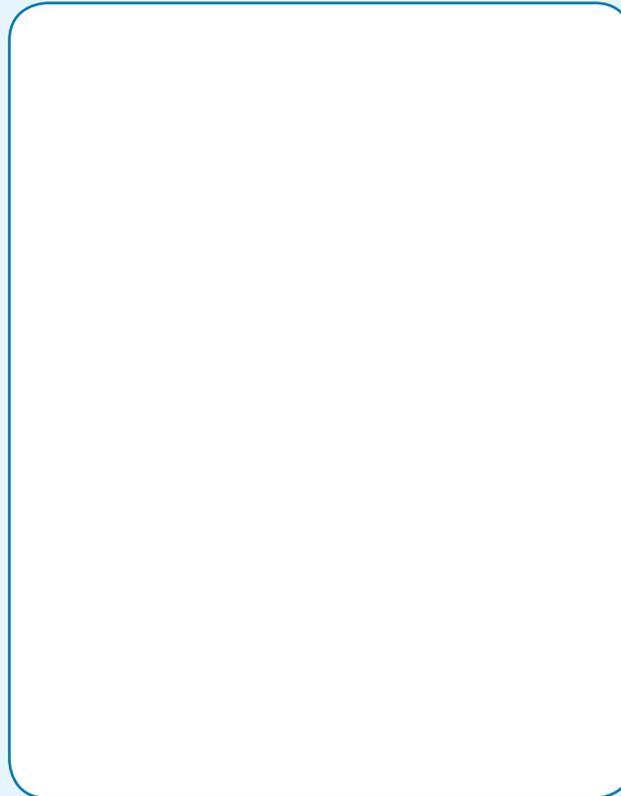
### Where to go for information

Should they speak to another team member, or third party? Would you like them to do desktop research?



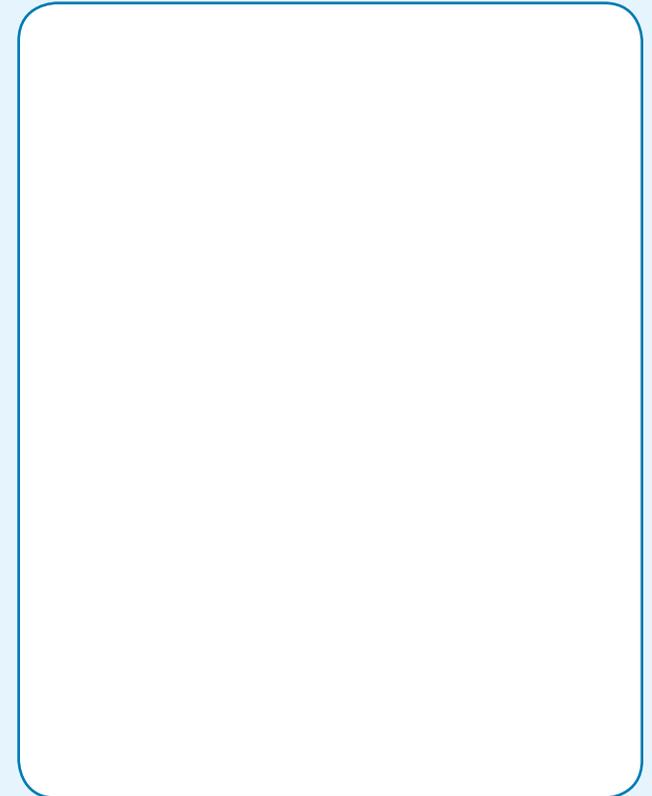
### How to work with others

Who should they report to and how often? Do they need to involve other team members before they start?



### Other things to bear in mind

Is one of the people they need to ask for information away at a certain time? Where should they file the information?



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## 5. Why will they want to do it?

Use your answers to this question to get your employee excited about the job.

### What's in it for them

Think about what your employee cares about, eg do they like to help others, solve last minute problems, like people to think they're smart?

### Why them

Frame why you've chosen this person for the job, eg does the task fit their job description, did they do a similar task well, is it a chance to grow?

[More ideas on how to motivate people.](#)

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## 6. The brief

Use the next two pages to pull together your thinking in a clear brief for your employee. Chat it through with them before handing it over. Remember to keep a copy for your records.

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# Brief for:

**What needs doing**

**Result I'm looking for**

**Why it's important**

**Why I'm asking you**

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# Brief for:

Deadline

Budget

People who can help

Key check in points

Other things to think about