Leadership training activities: a delegation practice session

Leadership training activities are most useful when new leaders rehearse a real task, and delegation is one of the first tasks they meet. This 75-minute session gives trios four fictional delegation scenarios with a hidden brief for the team member, a seven-part briefing sheet, a four-level scale of authority, an observation checklist and a filled example briefing.

75 minutes | 6–18 participants | Online and adaptable in person

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The outcome

By the end of 75 minutes each participant has given and received one delegation briefing, has observed a third, has a completed observation checklist with exact phrases, and has a written plan to delegate one real task with a level of authority and dated check-ins.

Before the session

- For trainers and HR or learning teams who run leadership training activities for new or future managers, team leads and project leads, with 6–18 people in trios. It fits a new-manager programme or a module on managing workload.
- Print the leader cards and the team-member briefs on separate pages, so that the team member’s concern stays hidden. Online, send each team-member brief in a private chat message. Choose three of the four scenarios, or let each trio choose.
- Print a briefing sheet for each leader, an observation checklist for each observer and a delegation plan for everyone. Plan trios in advance, with one or two groups of four with a second observer if needed.
- Explain before the session that the scenarios are fictional and that the four levels are a planning scale for this exercise, not a test or a personality type. Offer the observer role to anyone who prefers not to role-play. Turn on captions and allow cameras off.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- Delegation briefing sheet
- Leader cards
- Team-member briefs
- Observation checklist
- Delegation plan
- Filled example: briefing for scenario A
- Facilitator section: run of show, reference tables, debrief and adaptations

Delegation briefing sheet

Fill this in before you brief. Write short notes, not a script. End the briefing with a teach-back.

Part of the briefing	Your notes
The result: what exists when it is done	
Why it matters, and to whom	
The level of authority, 1 to 4	
Limits: budget, dates, rules and what not to do	
Resources, people to ask and time freed from other work	
Check-ins with dates	
Done when…	
Teach-back: what I will ask them to say back	

Leader cards

Give this page to the leader, or cut it into four cards. Do not show the team-member briefs to the leader.

Scenario	The task	What you know
A. The monthly client report	You write a monthly report for a client. From this month, a team member will write it. The October report is due to the client by Thursday 5 November at 17:00.	The client uses the report in a board meeting. Figures must come from the finance export only.
B. The team away day venue	The team needs a venue for an away day on Thursday 12 November for 14 people. You want a team member to choose and book it.	Budget: 1,500 in your currency, including lunch. The venue must be step-free and reachable by public transport.
C. The new starter's first week	A new colleague starts on Monday 2 November. You want an experienced team member to plan and run their first week.	HR runs the induction on Monday morning. The new colleague must complete safety training by Friday.
D. The supplier complaint	A supplier has sent an angry email about a late payment. You want a team member to draft the reply.	Finance confirms the payment was late by 12 days. The contract has a clause about late payment. Nothing may be promised about compensation.

Team-member briefs

Give this page to the team member, or cut it into four cards. Play the person as described. Ask your question if the leader does not cover it.

Scenario	Your situation and your question
A. The monthly client report	You already have two deadlines this week. You have never written a client report. Ask what happens if the finance export is late.
B. The team away day venue	You like organising events. You do not know whether you can sign the booking contract. Ask who signs.
C. The new starter's first week	You are happy to help but worry it will take a whole week of your time. Ask how much time to spend.
D. The supplier complaint	You want to apologise fully and offer a discount. Ask whether you can send the reply yourself.

Observation checklist

Tick one box for each item and write the exact words where you can. Give your notes first, in two minutes or less. Describe what you heard, not the person.

Scenario: _____ Leader: _____ Round: 1 / 2 / 3

What the leader did	Heard	Partly	Not heard	Exact words
Described the result, not only the steps	☐	☐	☐	
Said why it matters	☐	☐	☐	
Named the level of authority	☐	☐	☐	
Named the limits	☐	☐	☐	
Offered resources, and freed time from other work	☐	☐	☐	
Agreed check-ins with dates	☐	☐	☐	
Said what done looks like	☐	☐	☐	
Asked for a teach-back, not “Any questions?”	☐	☐	☐	
Heard the team member’s concern and answered it	☐	☐	☐	
Left the task with the team member	☐	☐	☐	

Delegation plan

Plan one real task that you will delegate in the next month. Keep it private, or share the level and the first check-in date.

A task I do now that someone else could learn or own

Who could take it, and what they would gain

The level of authority I will start at, and when I could move up a level

The first check-in date, and what we will look at

What I will stop doing with the time I free

Filled example: briefing for scenario A

A fictional briefing. The leader hands the monthly client report to a team member for the first time.

Part of the briefing	What the leader said
The result	The October client report in the usual template, sent to the client contact by Thursday 5 November at 17:00.
Why it matters	The client uses the report in a board meeting on Friday morning. Late or wrong figures reach their board.
Level of authority	Level 2 this month: draft the report and recommend the three comments; I approve and send. Level 3 from December if this month goes well.
Limits	Figures from the finance export only. Keep the template. Nothing goes to the client before I approve it.
Resources and time	The last three reports in the shared folder. The finance analyst answers data questions. About four hours; I have moved your supplier review to next week.
Check-ins	Tuesday 3 November, 15:00, 15 minutes: first figures. Wednesday 4 November, 16:00: full draft.
Done when	The figures match the export, three comments explain the largest changes, I have approved it, and it is sent by Thursday 17:00.
Teach-back	The team member said back the result, the level and the first check-in. They asked what to do if the export is late. Agreed: tell me by Monday 16:00 and we agree a new send time with the client.

Facilitator run of show

1 Open: delegation that went wrong | 7 minutes

Ask each person to write, silently for two minutes, one thing that went wrong when a task was handed to them, without names. Collect the answers for five minutes. Most answers fall into a few groups: unclear result, unclear authority, no time freed, no check-in or the task taken back. Keep the list on screen.

2 The four levels and the briefing sheet | 10 minutes

Show the four levels of authority and when each fits. Then show the seven parts of the briefing sheet and link each part to the list from the opening. Explain the teach-back: the leader asks the team member to say back the result, the level and the first check-in in their own words.

3 Demonstration briefing | 6 minutes

Brief a volunteer on scenario A for three minutes and skip the check-ins on purpose. Ask the group what was missing, using the observation checklist. Show the filled example briefing for the same scenario.

4 Round 1 | 12 minutes

Each trio takes a scenario. Three minutes: the leader fills the briefing sheet, the team member reads the hidden brief, and the observer reads the checklist. Five minutes: the briefing. Four minutes: the observer gives notes first, then the team member says what was clear and what was not, then the leader says what they would change.

5 Round 2 | 12 minutes

Rotate roles so that the observer becomes the leader. Use a new scenario and keep the same timing. Give a one-minute warning before the notes.

6 Round 3 | 12 minutes

Rotate again so that each person has had each role once. Use a third scenario. If time is short, cut the preparation to two minutes, not the notes.

7 Group debrief | 10 minutes

Ask which part of the briefing was hardest to say and which was most often missing. Ask which level people chose for scenario D, the supplier complaint, and why. Collect exact phrases that worked for the teach-back and for freeing time.

8 Plan one real delegation | 6 minutes

Each person fills in the delegation plan for one real task in the next month: the task, the person, the level, the first check-in and what they will stop doing. Ask each person to share the level and the first check-in date in one line, or to pass.

Reference tables

Four levels of authority

A simple planning scale for this session, not a validated model. Start a person at a lower level and agree when to move up.

Level	What it means	When it fits
1. Do it as briefed	The leader decides what and how. The team member carries it out and reports back.	A task with legal, contract or safety risk, or a person new to the task.
2. Recommend, then I decide	The team member investigates and proposes. The leader decides.	A person learning the task, or a decision that affects other teams.
3. Decide and tell me	The team member decides and acts, then tells the leader by an agreed time.	A person who has done the task with support and knows the limits.
4. Own it	The team member owns the result. The leader hears at the agreed check-ins only.	A person who has done the task well, with clear limits and a route for problems.

Suggested level for each scenario

There is no single right answer. The debrief asks each trio to explain its choice.

Scenario	Suggested start	Why
A. The monthly client report	Level 2	The team member has not done it before and the client sees the result.
B. The team away day venue	Level 3	Low risk, clear limits. Check who may sign the contract.

Scenario	Suggested start	Why
C. The new starter's first week	Level 3	An experienced colleague, with HR and safety parts fixed.
D. The supplier complaint	Level 1 or 2	Contract and payment risk. The leader approves the reply.

Debrief and next steps

Questions for reflection

- Which part of the briefing was hardest to say, and which was most often missing?
- Which level did you choose for the supplier complaint, and what would change your choice?
- What did the teach-back show that "Any questions?" would have missed?
- What will you stop doing so that the person you delegate to has the time?

Adapt the session

- For 4 or 5 people, run pairs with the leader filling the checklist afterwards as a self-review, or observe one round as a whole group.
- For a 45-minute version, keep the opening, the levels, one round and the delegation plan.
- Online, use breakout rooms of three, send the team-member briefs by private chat and share the checklist as an editable document. Allow cameras off; the observer can follow by audio or captions.
- For people who prefer not to role-play, offer the observer role in every round, or ask them to write a briefing for one scenario and swap it with a partner for a written teach-back.
- For experienced managers, add a mid-task problem card: halfway through, the team member reports that a limit cannot be met. The leader practises answering without taking the task back.

After the session

Ask each participant to hold the real briefing within two weeks and to write, after the first check-in, what the team member said back in the teach-back and what they would brief differently. At the next session, review two or three examples without names. A month later, ask whether the level moved up, stayed or moved down, and why.

Questions people ask

What are good leadership training activities for new managers?

Practice with a real management task works better than a general discussion. Delegation is a good first task because new managers often keep work they should hand over. This session gives trios fictional scenarios, a briefing sheet and an observation checklist, and ends with a plan to delegate one real task.

What are the four levels of authority in this kit?

Do it as briefed; recommend, then I decide; decide and tell me; and own it. They are a simple planning scale for the exercise, written for this kit, not a validated model. The level tells the team member which decisions are theirs.

How do you run a delegation role-play?

Work in trios with a leader, a team member and an observer. The leader prepares with the briefing sheet for three minutes and briefs for five. The observer uses the checklist and gives notes first. Rotate roles for three rounds.

What is a teach-back, and why use it?

The leader asks the team member to say back the result, the level of authority and the first check-in in their own words. It shows gaps that “Any questions?” usually misses, because people often say no to that question.

Can I run it online?

Yes. Use breakout rooms of three, send the team-member briefs by private chat, and share the observation checklist as an editable document. Keep captions on and cameras optional.

What is included in the free and editable files?

The open PDF has the briefing sheet, the leader cards, the team-member briefs, the observation checklist, the delegation plan, a filled example briefing and the 75-minute facilitator plan. Subscribers also receive the editable Word file, an Excel workbook with a delegation tracker and a checklist count, and a CSV of the plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.