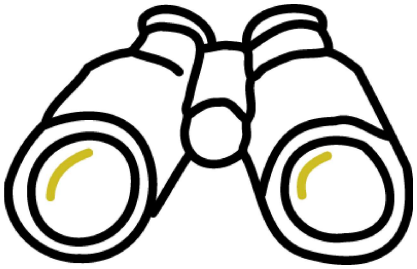
Leaders Club
Delegation Matrix Template



This dashboard helps you track delegation clarity and role shifts without heavy admin. It's built for quick scanning, light updates, and cumulative insight.

Task Area	Primary Owner	Support Role(s)	Delegation Notes	Status 🟢🟡🔴	Weekly Shift Summary
Strategic Planning	James	Mark	James leads; Mark supports scenario mapping	🟢	No change
Client Communication	Rachel	Anna	Rachel owns; Anna handles follow-ups	🟡	Anna now leads onboarding
Operations	Tom	Rachel	Tom leads; Rachel reviews weekly	🔴	Rachel stepping back due to workload
Financial Oversight	Mark	James	Mark owns; James tracks ROI	🟢	ROI tracking moved to monthly
Team Development	Anna	Tom	Anna leads peer recognition; Tom mentors	🟢	Peer feedback loop added

Set up Matrix

Step 1: **Define Key Task Areas** List the major categories of work or responsibilities in your team. (see examples in matrix below)

Step 2: Map Roles to Tasks Identify who you think should be the primary owner and who should support them. Put as much or as little detail in here as you want…you could add reasons why you chose who you chose, if you think their skills meet the task, if they need further support etc.

Use the matrix

The matrix is your check in on how delegation within your business is developing, it's only useful if you use it. So ideally on a weekly basis take a moment to update how the delegation is going

Step 3: Status Column:

- 🟢 = On track
- 🟡 = Needs attention
- 🔴 = Blocked or unclear Leaders update this with one click or dropdown.

Step 4: Weekly Shift Summary:

- Only updated if something changes.
- Keep a rolling log of delegation adjustments.

The Leaders matrix is one of the tools we use with our Leaders Club.

If you want to know more and be part of a group of leaders who support each other on their leadership journey then email us at Hello@thomasjardineandco.co.uk