PRACTICAL TOOL / DELEGATION & CONTINUITY

Can your organisation function without constant supervision?

A mini-diagnostic of delegation and operational continuity

Start with the work as it actually happens

An organisation can work efficiently while still depending on its leader to remember commitments, approve routine steps and follow up replies. This document helps identify dependencies worth clarifying before an absence or a busy period.

Choose three files that are genuinely in progress. For each question, select one assessment and record a fact, document or situation that supports it.

How to read your answers

V — In place and verified

P — Defined but not tested

I — Informal or dependent on one person

C — Needs clarification

There is no score. One weakness involving a contractual deadline, decision authority or confidential information can deserve more attention than several minor issues.

10 questions · 3 real files · one limited corrective action

Fillable on screen and printable. Answers remain in your file; this PDF contains no automatic submission action.

01 / OBSERVE EVERYDAY WORK

Decisions, reminders and handovers

01. Which decisions routinely wait for your approval?

Distinguish decisions that remain yours from routine decisions that can be covered by explicit delegation.

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

02. Who follows up when a reply is overdue?

Check who owns follow-up, the next reminder date and when a difficulty should be referred.

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

03. Where are commitments made in meetings or calls recorded?

Find the decision, next action, owner and deadline in a location known to authorised colleagues.

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

04. Can someone understand a file’s state without asking you?

Can another authorised colleague find the useful version, open points and next step?

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

05. What would happen if you were unavailable for two working days?

Identify a designated colleague, authorised actions and decisions that must wait for an authorised person.

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

02 / TEST CONTINUITY

Urgency, access and taking over work

06. How are urgent situations and exceptions recognised?

Can the team distinguish a pressing request from a real risk, and identify who should receive the matter?

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

07. Do the right people have the necessary authorised access?

Examine confidentiality, individual permissions, private mailboxes and isolated documents.

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

08. When do you receive follow-up information you can actually use?

Does the update show fulfilled commitments, outstanding replies, delays and decisions required?

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

09. How is successful completion of delegated work established?

Check the expected result, completion criterion and ownership of any further actions.

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

10. Could someone take over without reconstructing the whole history?

Does the handover explain decisions made, contacts, access limits and next actions?

- ○ Verified
- ○ Not tested
- ○ Informal
- ○ Clarify

Verifiable evidence

03 / TAKE ACTION

Test three current files

FILE 1

Subject / situation

Next action / owner

Deadline / approval

Authorised cover

FILE 2

Subject / situation

Next action / owner

Deadline / approval

Authorised cover

FILE 3

Subject / situation

Next action / owner

Deadline / approval

Authorised cover

The first correction to make

Prioritise a verifiable risk: timing, authority, confidentiality or handover. Choose a limited correction that can be tested.

Agreed action

Owner / verification date

Qualitative interpretation
Priority: an immediate consequence or unprotected sensitive information.
Formalise: follow-up depends on a habit or one person's memory.
Test: a written procedure or designated cover has never been tried.

This is an operational reflection aid, not an audit or a measure of personality, stress or health.
For a confidential discussion: www.assistante.ch/en/contact-us/