

HOW TO DELEGATE – THE BASICS

According to a recent Conference Board report, 78% of all personnel in major corporations believe that their “boss, manager, or superior, with whom [they have] a reporting relationship” **“routinely does work that would be more effectively done by someone at [my] level.”**

78%. That probably includes you. Fortunately, most managers agree with their team members. 66% of managers say they would like to **“increase their use of delegation as a time management and personnel development tool.”**

To determine whether you are a good candidate for considering delegation as a tool to improve you (and thereby your team’s) performance, take this simple quiz.

	Yes	No
1. Do you allow your team members to make mistakes?		
2. Do you frequently take work home or work late at the office?		
3. Does your team function smoothly when you are absent?		
4. Do you over-rule or reverse decisions made by team members?		
5. If you were incapacitated for 6 months, could a team member take over smoothly?		
6. Do you do some things your team members <i>could</i> be doing?		
7. Do your team members take initiative without input from you?		
8. When you return from a trip or training, is there a big pile in your in-box?		
9. Do your team members delegate to their teams (if applicable)?		
10. Do you spend time on details that you would rather spend on planning and supervision?		

To determine whether delegation may be able to help you, give yourself one point for each answer of **Yes** on the even-numbered questions (2, 4, 6, 8, and 10), and one point for each answer of **No** on the odd-numbered questions (1, 3, 5, 7, and 9).

The higher your score, the more likely you are to need to use delegation more than you are now. Any score higher than 5 indicates some need for additional delegation of tasks.

Delegation, when it is done well, has three important components.

1. **It assigns responsibility.** You make clear that the team member to whom you are delegating is now responsible for the outcome of this effort. It is *not* them “doing something for you”. It *is* them gaining a new (even if temporary) duty. Remember that you assigning them responsibility for the task doesn’t take away *your own* responsibility. Ultimately, it *is* your responsibility to get the work done.
2. **It provides authority.** The team member to whom you are delegating must have or be **explicitly** given the power to accomplish the task/project. In many cases, a manager is already doing what a team member should be doing. That means it won’t be too difficult for both parties to know that the team member has the requisite power or authority **in the eyes of others within the organization** to do the job.
3. **It requires accountability.** Hold the team member accountable for success or failure. This is not a role-play or comfortable training exercise where no real result is achieved. This also means that the team member will get the rewards if there are any individual ones. *Feedback and accountability go hand in hand – if you delegate, be prepared to give feedback!*

DELEGATION CHECKLIST

- ✓ **Analyze your job.** Look at your objectives, and what is expected of you. What do you do to actually achieve those goals? In other words, what tasks do you actually do that relate to those things you are evaluated upon? There is a big difference between "maximizing profit" and "retaining purchase authority over \$10,000". Then ask: "**Can** anyone else do this for the team?" Also, for those things you do which no one can do, ask whether a team member could be trained to do it (didn't you, at some point, *not know how to do it?*). Finally, it's not a bad idea to discuss this analysis with your supervisor, to avoid any areas where she feels it is inappropriate to delegate.
- ✓ **Decide what to delegate.** Once you have come up with a list from the analysis above, ask yourself: which tasks do I engage in most often? The more often you do something (particularly if it is quite routine), the more likely it is that you can delegate that task. In addition, look at areas that make you "over-specialized." Moreover, look at places where your team is more qualified than you are. Look at areas you dislike. This is not just to dump it on someone else, but it may be that someone on your team may *love* to do what you don't like. Remember to delegate some things that you *do* like as well. The acid test most highly effective executives use when delegating is "I'm going to try to delegate everything that is not a key/high priority for me." *Ineffective managers do as much as they can, and then whatever's left (even if it is high priority!), they delegate.*
- ✓ **Select the Right Person.** Consider each of your team members' interests and abilities. What developmental needs does each have? Who needs this most? Look at their upcoming schedule, their expressed desires for growth. Consider their interest in this task or project.
- ✓ **Plan the delegation.** Before you actually ask the team member to accept this new (though perhaps temporary) responsibility, plan the meeting you will have with them. Do a walkthrough, virtual role-play, or dress rehearsal of the entire meeting. What would you ask if you were the person being delegated to? Make sure you have all the necessary details. Be clear *in advance* what are reasonable limits on authority. Write down what the performance standards are. Write down what the ongoing feedback loop will look like. How often do you want a report or some kind of update? And, in that update, determine what constitutes a minimum acceptable level of information. (Otherwise, after 6 weeks of "everything's fine", you may get an "Uh-oh".) Plan for training or coaching if it is necessary for this team member's success.
- ✓ **Make the delegation.** This is the meeting where you actually ask the team member to accept the new task or project. Schedule it in advance. After your practice run above, you should be able to estimate the necessary length. By asking, as opposed to saying, "I want you to...", you give them the opportunity to verbally commit to the task or effort. Discuss how they will have authority, be responsible, and be accountable. **Be specific.** It is particularly important that you focus on **results versus methods**. If you tell them how to do it, they are doing it for you. When you tell them what results are acceptable, you show that you trust their judgment.

Sample Delegation Template	
The Guideline	How It Sounds
A) State your need for help	"Janet, I need your help."
B) Say why you are asking this person versus another (trust, skill, development, interest)	"You're my most competent and organized coder."
C) Ask for specific acceptance	"Would you be willing to take over the monthly statistical report preparation?"
<p>[There is a reason for asking early in the conversation for commitment. Most subordinates will quickly guess that you are going to ask them to do something. They will be waiting for you to get to the specific thing you are asking for, and will <i>probably miss a lot of what you say until they hear what you want</i>. Ask right away. If they hesitate, that's fine – you haven't given them the details yet. If they say yes right away, you will be energized to tell them what they need to know.</p>	
D) Describe the task in detail	"Here's what's involved..."
E) State deadline and quality standards	"It has to be turned in to Peggy Brown by the last Friday of the month, so I will need it the last Wednesday to review it. It must be 100% error-free when we forward it."
F) Discuss reporting standards	"I'd like you to give me an update each Tuesday, and in the beginning, I'll want to actually see the work you have done, to make sure we're on the right track."
G) Discuss Skill/Training Needs	"What do you need from me in order to do this? What can I show you, or whom I can direct you to, to make this go smoothly?"

- ✓ **Follow up.** This is the weakest area (not just in delegation) for newer managers. Insist on timely updates and information, per the agreement you planned for and delivered, and to which they agreed. If a deadline or suspense is missed, immediately address it with feedback. [*Remember that you can love one of your team members and still give them feedback that says they need to do better.*] Ask them what they need as much as possible, versus telling them what to do. That reinforces that this duty is theirs, and not yours. Also, fight your tendency to take back an assignment because it is not going well or because it has somehow become more important to the organization. Provide feedback on the overall process when the project is complete. And, when results are achieved...
- ✓ **Celebrate!**