



Effective Delegation

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Purpose of Effective Delegation:

To achieve results as a leader and manager you must effectively get results through others. The finest managers and leaders not only get results through others they inspire and often times get better results from others than their peers. Effective use of delegating is the hallmark of effective leaders, managers and a business that is growing and succeeding.

Result or Output:

A step by step delegation process that clearly outlines how to delegate effectively and which predictably and consistently delivers results when following these benchmarks.

Why you need Effective Delegation:

Unless you are a small business owner with only yourself as the single employee you need to delegate in order to get results through others. Your managers will need to delegate effectively as the business expands. There are several types of delegation, delegation of a task or project and then delegation of authority. In building your organizational strategy and position contracts you have already effectively delegated authority and specific tasks to your staff. Delegation can be a challenging process for both the sender and receiver. If not effectively delegated to, the receiver can feel embarrassed and incompetent when they fail to provide the results their supervisor asked for. For the manager not being able to depend upon staff to complete tasks that have been delegated means a loss of performance, and an inability to expand their capacity as a leader. You need to be prepared to expect a learning curve for both yourself as a manager and for the employees who you delegate to. Effective delegation offers the employee an opportunity to prove their worth and increase their confidence. It means the manager is able to achieve far greater results than they could have on their own. In the greater percentage of cases poorly delegated tasks are the result of a manager who is not fully aware of the proper methods for delegating effectively. As you will see by this process, delegation can fail for a variety of reason: poorly defined results, time frames, lack of authority, failure to check in as the process flows to completion, and more often than not poor preparation and documentation by the person who delegated the task. If you're an owner or manager you need effective delegation to expand the ability of your department or business to perform effectively. No one can do it all themselves. Effective delegation is often the first place where systems begin to appear to provide relief for an owner and manager. Employees instructed to follow detailed guidelines, to make decisions, and get results feel empowered. These small successes transform the business into a highly confident and competent staff that generates momentum that propels a business forward.

The Key Steps to Effective Delegation: Donna Genett in her book "If You Want It Done Right, You Don't Have To Do It Yourself" describes six steps to effective delegation. We agree with these steps and have only slightly modified her directions.

Step #1: Prepare Beforehand: Nothing will determine the successful outcome of a task to be delegated more than taking the necessary time to prepare what you want to achieve before delegating a task to someone. If you're not clear what you expect how can you possibly ask someone to achieve a result? Preparation means knowing what you want, when

you want it and how far you will allow the delegatee to proceed on the path toward achieving this outcome. It means being aware that you or they may need to check in to get feedback depending on how big the task is. The worksheet provided should help you think on paper to prepare for the task you plan to delegate. Great minds think on paper, and while every task is not necessary to delegate in writing, most would benefit from at least writing down the outcome you expect.

Step #2: Clearly define the task to be completed: Donna Genett recommends you ask the person to whom you delegate to repeat the information back to you to ensure that he or she fully understands. We recommend never delegating anything unless you do it in writing. We recommend following the effective delegation form provided with this process to ensure that there is never any miscommunication regarding the assignment you've delegated. Still asking them to repeat these instructions is a good idea which we would highly recommend even with the instructions clearly written down. If you've ever received an email from someone and not been sure what the tone of the instructions was you know how important this step can be. Emotions provided can be more important than the letter of the information. So be sure to ask the person you are delegating to repeat the tasks, and if you feel there is any chance of miscommunication of intentions, reinforce and ask them to repeat the instructions again. Here are some guidelines to consider for when to delegate in writing:

1. Assigned task is large and will have a significant number of benchmarks to produce the desired outcome.
2. Person you are delegating to has no previous experience with this type or task/project, or they are new to the company.
3. The impact of the delegated task would be harmful to the company, yourself or the participant if it were not achieved. This may not mean physical harm, but embarrassment and loss of self esteem personally or professionally. This is something serious to consider as some mistakes are difficult to rebound from. Make sure the assigned person clearly understands the outcome if the task could result in some emotional or physical disappointment.
4. The assignment is unclear or confusing, even though simple and could be easily misunderstood.

We recommend you create your own list for your company by having a manager and employee meeting to discuss delegation and the new rules for delegating. Often times the uniqueness of the business offers some nuances where either delegating in writing is critical, or verbal delegation is most expedient. Make sure your company has rules to govern delegated tasks that make it clear what's expected and when. A worksheet for creating rules is provided at the end of this process.

Step #3: Clearly outline the time frame within which the delegated task must be completed: Clear instructions on the time line that you have for completing the task create a sense of urgency and leave no room for lack of accountability. Make sure to get agreement from the person who is assigned the task that this is sufficient time to complete the task to the specifications. We recommend you get this agreement in writing, and signed off on by the delegatee as provided for in the delegation form. We suggest you build an exception report into the delegation process so that if the person assigned the task is unable to complete it within the timeline agreed upon they have a reporting device to give ample time to warn you.

Step #4: Define the level of authority he or she is to use with this task:

Level One: Authority to RECOMMEND

Level Two: Authority to INFORM And INITIATE

Level Three: Authority to ACT

Depending upon the experience of the person who you are delegating, the impact of the assignment, and the consequences that could result you will want to temper how far along the completion of a delegated task you want your delegatee to go. These three levels of authority should cover every situation, and allow you the opportunity to either take over the task when it becomes more difficult, instruct the person on corrections or be aware of the progress and give them the go ahead to proceed further, or if the task is of less impact or the person being delegated to has sufficient experience they can proceed to completion without any influence from you. Again we recommend the degree of authority be in writing and clearly communicated with the checkpoints [see below and worksheets for preparation.] determined during the initiation of the delegation process. As Donna Genett points out in the book "If You Want It Done Right, You Don't Have to Do It Yourself," 'sometimes it's better to start small and experience a few successes before moving on to something bigger. It's more internally convincing that way.... Human Nature 101: We tend to be open to new and more difficult things if we've succeeded at some smaller, simpler things first.' This is true for both the person delegating and to whom you are delegating too. Don't bite off too sizeable a project the first time, and don't expect a novice to deliver on a project that is their first effort at delegation.

Step #5: Identify checkpoints with delegatee to review progress and offer guidance if needed. Regardless of the level of authority you decide upon you should set up checkpoints ahead of time to check in and make sure you take advantage of the opportunity to coach and teach your delegatee the values that can be gained as they move ahead with their delegated task. If for no other reason it also gives you the opportunity to complement and reinforce the work they are doing. Make sure to schedule these checkpoints, and even if it is a relatively easy delegation, make it a habit to catch the person you've delegated the task to doing something right. It will boost their confidence and make the next task you delegate easier to manage.

Step #6 Hold a debriefing session. Discover what went well, what could be improved, what has been learned. There's a lot to be gained in a follow up meeting with the person you delegated to. Focus on what went well first, then what could be improved and finally what was learned. Include yourself in this debriefing, but of course when meeting with the delegatee place all the pros on them. It's a good idea to hold your own debriefing prior to meeting with them to help them to see what went right. If the delegation process failed it will be important for you to sort out where you were guilty of not providing the right information and help to make it a success. Don't be afraid to admit your mistakes. Staff that sees a manager who is willing to step up and accept the fall when their subordinates fail will gain your respect, and will be much more willing to accept responsibility for their failure. You'll probably find them more willing to go the extra effort when working with you in the future. If the delegated task was difficult this process can provide a lot of helpful insight in improving delegated tasks in the future. If it's likely there will be a similar project in the future much can be gained to save you, your staff and the company valuable time, energy and embarrassment by a good review.



WORKSHEETS

Manager Preparation

Who is this to be delegated to?
 What is to be delegated?
 What is the outcome or result you expect from this?

Will this be the first time this person is being asked to perform a task like this?
 What kind of experience have they had with this operation or task? Will they need help or input from others? Will they need other resources or research vehicles to get results necessary to complete the task?
 [Be as specific as possible. Think in terms of who, what, when, where and how. Think about the exact outcome you desire and paint as vivid as possible a word picture of the outcome you want to receive. Is there a specific format or form they should follow. A font or delivery method to complete it in. (Adobe, Excel or Word?)]

How long do they have to complete this?
 What is the exact date and time for completion?
 [What is the time line for finishing? When do you want the task completed? Will that allow time for you to check the work over and still have time to correct or send this back to get it done to the exact specifications you wanted?]

What Level of Authority will this person have to complete this task?

- Level One: Authority to RECOMMEND**
 [Proceed only to the stage of discovery. Research options and propose the best alternative. Use this level when you want input before making a decision.]
- Level Two: Authority to INFORM and INITIATE**
 [Research and select the best course of action; inform why it is best; initiate the selection. Use this level when you want someone to inform you before he or she takes action so you can intercept potential problems.]
- Level Three: Authority to ACT**
 [Full authority to act with respect to the task or project. Use this level when you are confident of someone’s capabilities and the risks are minimal.]

The following table might be helpful to rely upon when deciding what level of authority to use:

		<i>Employee Knowledge Expertise</i>		
		High	Medium	Low
<i>Importance of the Task and/or Project's Perils</i>	High	Inform and Initiate	Recommend	Recommend
	Medium	Act	Inform and Initiate	Recommend
	Low	Act	Inform and Initiate	Inform and Initiate



Delegation Agreement

Request from Manager

Request Date:

Please commit to the following accountability

[Use as much room as necessary. If necessary supply full information on another page(s)]

Commitment Date to be completed by:

Level of Authority on this task:

- Level One: Authority to RECOMMEND
- Level Two: Authority to INFORM And INITIATE
- Level Three: Authority to ACT

Respond by [date & time]

If no reply by this date & time it will be assumed you have accepted responsibility for this accountability.

Checkpoints for this project for manager and delegatee to meet and review progress

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-
-
-
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Response to Manager

Accountability Accepted - Date: _____ Time: _____

Accountability Accepted but due date and time changed to: [New Date: New Time:]
Because of _____

I cannot accept this accountability because _____

Delegated task completed on _____

- Task was completed on time
- Not completed on time [Provide Reason] _____

Debriefing and review of delegated task held on _____

Manager authorization _____

Delegatee authorization _____