

Delegating effectively – good practice guide

When we are busy it can be difficult to make time to step back and look at what we ‘should’ be doing as opposed to getting on with what’s in front of us.

Delegating can help, but only if it’s done effectively. Otherwise, it can prove more time consuming than simply carrying out the task ourselves in the first instance.

At our meeting in November we shared ideas of how to delegate effectively – summarised in this good practice guide. As one delegate commented “*don’t delegate a hospital pass!*”. Another advocated delegating everything before going on holiday and reinventing oneself after returning. Some delegates had reservations about delegating ‘relationships’ – which needs to be balanced with creating new relationships and stronger associations – perhaps another topic for discussion.

Delegation involves getting the right person to do the job at the right time.

Remember the Eisenhower principal (see right): Important matters are never pressing and pressing matters are seldom important.



Context

- Up front effort is required to delegate effectively – but there is the potential for big rewards all round.
- Both parties can contribute to improving the ongoing process.
- Delegating is a vital skill for effective leadership and for those with leadership aspirations.

Potential advantages and disadvantages

When done well delegating saves the delegator time, increasing their scope to undertake more challenging or rewarding activities in line with their career aspirations, whether inside the current organisation or not. It might make a business saleable without the owner.

It also motivates and develops the deputy, giving them the experience and confidence to take on more responsibility and earn promotion. It may capitalise on the knowledge of subordinates – resulting in a better job. Those at the coal face often know best how to do something.

It can also create a rewarding working environment where peoples’ careers progress, and also reduce the organisation’s reliance on external new hires. How else do you train people? It’s the best tool in your locker for this.

Delegation of work to the lowest level that it can be carried out properly is very efficient and contributes to improved profitability.

Done badly it can cause confusion, frustration and demotivate, with the task not successfully completed.

In practice: When?

For each task, ask yourself:

- Must you do it personally (critical/unique skills)?
- Is it the best use of your time?
- What does it contribute to your own career goals?

Make sure you delegate early, when there is still sufficient time to delegate effectively.

In practice: Who?

- Does someone else have, or could they learn, the skills, knowledge and experience required?
This applies even in small organisations.
- By delegating could you develop others so that they can take on similar tasks or the same task if it recurs – freeing up your time in the future?
- Is it an opportunity to develop someone else in line with their career goals, working style (independent/team, etc) and workload?
- Is there sufficient time for training, questions, monitoring, and reworking (if required)?
- Can you manage the consequences if the work is not perfect?
- Sometimes it can be worth 'delegating' to someone outside your organisation.

Delegating: Good practice

- Decide what to delegate and delegate it early.
- Include people in the delegation process – explain why were they chosen, what tasks they will undertake and when. Don't duplicate, delegating the same task to more than one person.
- Delegate to the lowest possible organisational level – those closest to the work often have the best knowledge of the intimate details to get it done most efficiently. But they must be willing and able.
- Motivate and build commitment by discussing the benefits of success (money, promotion, recognition, gratitude, etc). And the 'big picture' benefits to the organisation.
- Try and delegate similar tasks to a particular person.
- Focus on the desired result not how the task should be tackled. Do not be prescriptive on 'how to'.

- Delegate some responsibility but recognise that you must retain ultimate accountability for major problems. The buck stops with you. Don't abdicate responsibility but do delegate the authority for the means to achieve the goal.
- Identify constraints and boundaries such as lines of authority, responsibility and accountability. Is this temporary or permanent? Define your role and whether the person should:
 - Wait to be told what to do
 - Ask what to do. Has just a task or also some decision-making power been delegated?
 - Make a recommendation then act on it
 - Act and immediately report results
 - Act and report periodically.
- Ensure that the delegated task is SMART
 - **SPECIFIC:** Written, positive and clear on the intended result
 - **MEASUREABLE:** Clarify what success looks like
 - **ATTAINABLE / ACHIEVABLE:** Realistic, with time for each step
 - **RELEVANT:** Aligned with goals
 - **TIME:** Deadline, actual, recurring linked and ongoing. Agree a timeline for monitoring of progress.
- Delegate complete tasks not isolated subtasks whenever possible. For a complicated task it can be sensible to confirm the goal and constraints, etc in writing.
- Provide support, not just on any part of the task you have agreed to do yourself (which must be done properly and on time) but through ongoing communication, being available to answer questions and providing resources such as information, facilities or training.
- Maintain control of timelines & deadlines. Seek progress reports. Be clear that you should be informed of any hitches, agree checkpoints to review progress, make adjustments, and allow and take time to review the work done.
- But do not interfere! Avoiding micro-managing is not the same as complete abdication of control.
- Resist upward delegation or handing back of incomplete tasks. If there is a problem, ask for recommendations, don't simply provide an answer.
- Monitor results, give praise and credit if the project goes well and obtain feedback to improve the process next time. Technology can play an important part in monitoring progress.

Barriers to delegation:

- Is a subordinate willing and able – or would they be if you approached them correctly?
- Insufficient time to explain
- Not sure what needs doing
- Quicker if I do it
- Superior asked me
- Enjoyable
- Fear of a superior result
- Loss of control
- Subordinates may lack confidence but have plenty of ability – if encouraged and nurtured
- Fear loss of authority or prestige
- Arrogant belief that an inferior result will ensue – often the outcome is superior.
- Coping with resistors.

Six W rules of delegation:

When delegating a task, ensure that you communicate the following:

- What
- Who
- Why – benefits all round
- In what way – but not prescriptive
- With what
- When.