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WHITE PAPER

Effective Delegation

So why do so few managers delegate effectively? My experience in management, teaching, and coaching leaders confirms there are two major reasons front-line leaders do not delegate. First, they do not clearly understand the concept of delegation, and second, they do not understand how to delegate.

Effective **Delegation**

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Pitfalls

Before you learn the four steps to effective delegation, it is critical that you understand and avoid the five delegation pitfalls.

Pitfall One: Over-delegation

Ensure you do not overload your team with delegated duties they cannot successfully complete. Remember that we tend to delegate tasks only to our peak performers, which will quickly turn a top-producing star into a demotivated employee.

Pitfall Two: Under-delegation

Under-delegation occurs when we keep too many tasks for ourselves while underutilizing the skills, strengths, and potential of your team. Develop an attitude that you willingly desire to grow your team, to delegate proper tasks, and give yourself more free time for your own personal and professional growth.

Pitfall Three: No Delegation

It is only a matter of time for managers that do not effectively delegate to lose their best employees (from lack of growth), burn themselves out (from over work), and be viewed by top managers as a marginal contributor (from lack of delegation).

Pitfall Four: The "It's Faster if I Do It Myself" Pitfall

This is an extremely dangerous pitfall, for it implies that only the manager has the skill, knowledge, or ability to handle the situation – that they are indispensable! Such a foolish approach will leave you tired, stressed, and pondering why you can't find good people.

Pitfall Five: Collecting "Monkeys"

A "monkey" is any task that requires action. If you decide to make the next move on a task, then you have the monkey; if your employee decides to make the next move, then they have the monkey. Well-meaning people often go on "monkey roundups" taking on dozens of tasks given to them by their employees all in the name of being a "good" manager. Instead, kindly return all monkeys (tasks) that are not in your job description to their rightful owners. Let the employee who owns that task again have the honor of performing that task. Second, announce that you will no longer go on monkey roundups, that you are there to coach, lead, train, and support everyone to achieve great results but you are not there to do their jobs!

Four Steps to Effective Delegation

Good delegation is not a mystery. It is a systematic application of four fundamental steps.

Step One: Choose the Right Task

The first step in effective delegation is to choose the task. Ask yourself which tasks you can and cannot delegate. In most cases, you should never delegate such core supervisory responsibilities as performance appraisals, reprimands, performance counseling sessions, terminations, or confidential staff issues. Although not a comprehensive list, you must think carefully about those duties that only you should and must perform as a leader, and therefore are not eligible for delegation. After that, all other duties are open for delegation consideration.

For those tasks eligible for delegation, ask yourself questions such as:

- What tasks do I perform that could grow specific skills and knowledge of my team?
- What tasks do I perform in which my current employees excel and if so, can I then delegate my tasks to peak performers?
- What tasks do I perform that require skills that my team needs to be more successful today and into tomorrow?

Step Two: Choose the Right Person

The second step to effective delegation is to choose the right person. So what should you consider in choosing the right person? Several things such as:

- The employee's current skill level.
- The employee's current motivation.
- Consider double delegation.
- Think both short-term and long-term.

Step Three: Communicate the Delegation

Regardless of the communication channel available, every delegated task should include these guidelines.

Review the Results to Be Achieved

For example, you may say that you want to improve customer response time by 5% and would therefore like to delegate your current duty of completing the customer feedback report to the employee. By framing the delegation in key results to be achieved, the employee then clearly understands the importance of the task in achieving great results.

Define the Task

After describing the key results, discuss the specific series of actions required to successfully complete the task. In the above example, you may give the employee an actual customer feedback report and show them each of the key steps to properly completing it. Ensure the employee fully understands the scope and nature of the task.

Set Performance Parameters

Now is the time to share how the employee will be measured for their performance. Consider setting standards in one or more of the following categories:

- **Quality** — including parameters on thoroughness, accuracy, or overall appearance
- **Quantity** — including parameters on meeting certain amount or number goals
- **Time** — including parameters on start time, stop time, duration, and frequency of the tasks
- **Cost** — including dollars spent, dollars saved, or dollars earned

Provide appropriate direction and support.

Create a training plan with the employee to help them learn the skills needed to succeed in the task. Also consider the type and amount of support materials or resources they will need as well as how best to give them total access to these materials. Ask what other support they may need including access to you for questions, further training, and moral support.

Set Performance Parameters

- **Level 1: Wait until Told** — The employee must wait until you tell them to act. No action is being taken, so no results are being achieved.

- **Level 2: Ask What to Do** — the employee is thinking and seeking your permission. Although no action is taking place, at Level 2 the employee is consciously seeking advice on the best course of action.

- **Level 3: Recommend** — the employee is giving you recommendations how what actions should be taken. Although a higher level of initiative than Level 2, there is still no action being taken on the task.

- **Level 4: Act and Report Immediately** — the employee is given the freedom to act on the task and instructed to get feedback to the manager on the results.

- **Level 5: Act and Report Routinely** — This is the highest level of initiative that allows the employee complete freedom to act on the task and routinely report back to their leader, be it daily, monthly, even quarterly.

Step Four: Checkpoints

The final step in effective delegation is to set checkpoints to ensure progress. Also, create a solid coaching and feedback plan within your checkpoints in delegation. Be ready to help your employee whenever you notice their performance is slipping. Encourage them to contact you with issues, concerns, or training needs. Remember, your job is not to do their job but to help them learn to do their job. Finally, within your checkpoints, schedule celebrations of their progress and success. Keep the momentum high for task completion through appropriate recognition, rewards, incentives, or even a sincere "Thank You".

Summary

Delegation is appointing another to act in your behalf. Effective front-line leaders follow the four steps of delegation from choosing the task, choosing the person, communicating the delegation, and setting checkpoints for follow up and redirection. Through effective delegation, you build a stronger team today as you prepare your team for the challenges of tomorrow.