

# **The Steps Of Successful Delegation**

## **1 Define the task**

Confirm in your own mind that the task is suitable to be delegated. Does it meet the criteria for delegating?

## **2 Select the individual or team**

What are your reasons for delegating to this person or team? What are they going to get out of it? What are you going to get out of it? Is the other person or team of people capable of doing the task? Do they understand what needs to be done? If not, you can't delegate.

## **3 Explain the reasons for the task and the bigger context**

You must explain why the job or responsibility is being delegated. And why to that person or people? What is its importance and relevance? Where does it fit in the overall scheme of things?

## **4 State required results**

What must be achieved? Clarify understanding by getting feedback from the other person. How will the task be measured? Make sure they know how you intend to decide that the job is being successfully done.

## **5 State the decision-making status for the task/project**

A critical part of the required results is explaining the level of autonomy you are giving the person. You must be explicit about this; a failure to do so is one of the most egregious errors a supervisor can make. See the levels of delegation worksheet.

## **6 Consider resources required**

Discuss and agree what is required to get the job done. Consider people, location, premises, equipment, money, materials, training, other related activities and services.

## **7 Agree on the deadlines**

When must the job be finished? Or if an ongoing duty, when are the review dates? When are the reports due? And if the task is complex and has parts or stages, what are the priorities?

At this point you may need to confirm understanding with the other person of the previous points, getting ideas and interpretation. As well as showing you that the job can be done, this helps to reinforce commitment.

Methods of checking and controlling must be agreed with the other person. Failing to agree this in advance will cause this monitoring to seem like interference or lack of trust.

### **8 Make them report in on progress**

Require person to check in with you on progress. It is their responsibility to keep track of projects and status and inform you, not yours. If they have no tool for doing this, give them one they must fill out and enforce its use.

### **9 Support and communicate**

Think about who else needs to know what's going on, and inform them. Involve the other person in considering this so they can see beyond the issue at hand. Do not leave the person to inform your own peers of their new responsibility. Warn the person about any awkward matters of politics or protocol. Inform your own boss if the task is important, and of sufficient profile.

### **10 Give feedback on results**

It is essential to let the person know how they are doing, and whether they have achieved their aims. If not, you must review with them why things did not go to plan, and deal with the problems. You also must ask for feedback on how the delegation process went from their perspective. And you must always absorb the consequences of failure, and pass on the credit for success.

## Levels Of Delegation

These examples of different delegation levels progressively offer, encourage and enable more delegated freedom. The higher the level, the more autonomy and the more the supervisor is freed from doing work. But the higher the level, the greater the risk of an unexpected and potentially unwelcome outcome.

### **1 "Wait to be told." or "Do exactly what I say." or "Follow these instructions precisely."**

This is instruction. There is no delegated freedom at all.

### **2 "Look into this and tell me the situation. I'll decide."**

This is asking for investigation and analysis but no recommendation. The person delegating retains responsibility for assessing options prior to making the decision.

### **3 "Look into this and tell me the situation. We'll decide together."**

This has a subtle important difference to the above. This level of delegation encourages and enables the analysis and decision to be a shared process, which can be very helpful in coaching and development.

### **4 "Tell me the situation and what help you need from me in assessing and handling it. Then we'll decide."**

This opens the possibility of greater freedom for analysis and decision-making, subject to both people agreeing this is appropriate. Again, this level is helpful in growing and defining coaching and development relationships.

### **5 "Give me your analysis of the situation (reasons, options, pros and cons) and recommendation. I'll let you know whether you can go ahead."**

Asks for analysis and recommendation, but you will check the thinking before deciding.

### **6 "Decide and let me know your decision, and wait for my go-ahead before proceeding."**

The other person is trusted to assess the situation and options and is probably competent enough to decide and implement too, but for reasons of task importance, or competence, or perhaps externally changing factors, the boss prefers to keep control of timing. *This level of delegation can be frustrating for people if used too often or for too*

*long, and in any event the reason for keeping people waiting, after they've inevitably invested time and effort, needs to be explained.*

### **7 "Decide and let me know your decision, then go ahead unless I say not to."**

Now the other person begins to control the action. *The subtle increase in responsibility saves time. The default is now positive rather than negative. This is a very liberating change in delegated freedom, and incidentally one that can also be used very effectively when seeking responsibility from above or elsewhere in an organization, especially one which is strangled by indecision and bureaucracy. For example, "Here is my analysis and recommendation; I will proceed unless you tell me otherwise by (date)."*

### **8 "Decide and take action - let me know what you did (and what happened)."**

This delegation level, as with each increase up the scale, saves even more time. This level of delegation also enables a degree of follow-up by the manager as to the effectiveness of the delegated responsibility, which is necessary when people are being managed from a greater distance, or more 'hands-off'. The level also allows and invites positive feedback by the manager, which is helpful in coaching and development of course.

### **9 "Decide and take action. You need not check back with me."**

The most freedom that you can give to another person when you still need to retain responsibility for the activity. A high level of confidence is necessary, and you would normally assess the quality of the activity after the event according to overall results, potentially weeks or months later. Feedback and review remain helpful and important, although the relationship is more likely one of mentoring, rather than coaching per se.

### **10 "Decide where action needs to be taken and manage the situation accordingly. It's your area of responsibility now."**

The most freedom that you can give to the other person, and not generally used without formal change of a person's job role. It's the delegation of a strategic responsibility. This gives the other person responsibility for defining what changes projects, tasks, analysis and decisions are necessary for the management of a particular area of responsibility, as well as the task or project or change itself, and how the initiative or change is to be implemented and measured, etc. This amounts to delegating part of your job - not just a task or project. You'd use this utmost level of delegation (for example) when developing a successor, or as part of an intentional and agreed plan to devolve some of your job accountability in a formal sense.