




Four Essential Aspects of Effective Leadership - Theory and Application

Part 4 Section 5


Delegation - Why, When, and How

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OUTCOMES

AFTER completing this section, you should:

- ⇒ Be able to explain what delegation is and isn't
- ⇒ Understand why delegation is necessary
- ⇒ Understand when you should, AND when you shouldn't delegate
- ⇒ Be able to explain the four steps to effective delegation
- ⇒ Understand the common barriers to effective delegation

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The Four Steps to Effective Delegation

Before we cover the details of this section, here's a summary of the four steps to effective delegation:

1. **Delegate** the task
2. **Relegate** authority
3. Provide **back-up**
4. Schedule **follow-up**

For memory: **Delegate, Relegate, Back-up, Follow-up.**

Let's start with a definition.

Delegation Defined

To delegate means to give another person a task, duty, or activity while retaining responsibility for the outcome.

That latter is key. When you delegate, *you are still responsible.*

Essentially, when you delegate you are giving away a part of your own responsibilities, *but delegation is not abdication!*


You still own the outcome and are therefore still vested in the task, duty, or activity.

It's also important to note that Delegation is not a means to creating free time for yourself.

You can and should delegate to free up your time, but not so that you can enjoy free time while others work.

This last point doesn't always apply if you're an entrepreneur, or a business owner, that is, if your time belongs to you, rather than to an employer who is paying for your time.

In such cases delegating to others, sub-contracting, outsourcing, employing others to do what you have done yourself in the past (all forms of delegation),

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may well be done to create free time for yourself – that, after all, is one of the reasons to become an entrepreneur or business person. More likely though, especially in the beginning of a venture, delegating creates time for you to concentrate on high-value creation tasks.

But when you're an employee, even at upper management level, delegating what is rightly your own responsibility to those that report to you, so that you can have what may be seen as "leisure time", especially if your reports are already working at, or close to, capacity, is very likely to create resentment, de-motivate the team, and lead to lower productivity.

To recap:

To delegate means to give another person a task, duty, or activity while retaining responsibility for the outcome.

Why Delegate?

There are three main reasons to delegate:

1. To free up your time for highest-value use.

As a leader, highest-value use of your time means being creative; working out how best the organization can maximize the value it exists to create.

The more time you get to spend reviewing, analyzing, strategizing, planning, networking, and just plain thinking, the better.

2. As a development tool for your reports.


Everyone in your organization should be growing; actively learning and increasing their capabilities.

Delegation is one of the best ways to achieve that.

Delegating part of your own responsibilities to a report is effectively training them how to do part of your job; helping to prepare them for the next move in their career.

3. To make use of other's expertise.

There are so many things that you need to do that other people are much better at. Whether you're a manager, an entrepreneur, or a business owner, be ruthless in delegating (outsourcing) anything that that someone else can do better, faster, cheaper. Here's a good rule to follow:

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Pay others to do what you could do yourself whenever there's mutual exclusivity between the task in question, and something else you could be doing that would create more value.

When to Delegate

A major part of your job as a leader IS delegation, so the brief answer is:

Delegate **whenever you can** and **whatever you can**, on the understanding that you cannot and should not delegate anything and everything.

So let's consider what you shouldn't delegate.

When NOT to Delegate

Most importantly, don't delegate those things that only you can do.

Some responsibilities rightly belong only to the organizational leader.

In brief, these are, Envisioning, Strategizing, Delegating, Scanning, Networking, and Codifying. *[These are covered in detail in Part 2, Section 3 of the course.]*

If you can confidently delegate all of these responsibilities to someone else in your organization, one of you is probably redundant.

Next, you need to consider whether and how the job will get done.


You should not delegate a task, duty, or activity unless the person you are planning to delegate to has the capability to handle the task or, if they don't have the capability, that you have time to train them properly and provide necessary supervision.

We need to stress here that "not having time" shouldn't become an excuse for you to not delegate. Sometimes you have to make time now to save time later. We'll look at this again later in the "barriers to delegation" section.

The next consideration is about time.

You should not delegate to those already struggling with their workload.

There's a fine line between working to capacity and being overloaded, and because everyone's productivity is different, you need to make a careful assessment of who can handle what.

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Of course, you'll likely have a standard within the organization for what output or outcomes are expected of a person or role within a given timeframe.

Use these as a yardstick to assess whether a given individual can rightly take on the additional load of that which you are planning to delegate to them.

Finally, do not delegate tasks where there is significant risk of failure, or where the cost of failure is higher than the cost of your time to do the task yourself, or higher than the cost of your time to properly train and supervise the person you plan to delegate to.

Sometimes it does make sense to be safe and do it yourself.

How To Delegate Effectively – The Four Steps Revised

DELEGATE THE TASK

The most important thing is to ensure that the required outcome is clearly understood.

That means covering a few aspects:

Explain clearly and in detail what a successful outcome looks like.

This is crucial, because success is in the outcome, not just the doing of the task.

Solicit feedback to ensure understanding.


You and the assignee need to have exactly the same understanding of what's expected, so ask them to explain back to you, and make sure they have grasped all the essentials.

Specify what methods they should use only if it's necessary, depending on the experience and competence of the person you're delegating to.

More experienced or competent individuals should be able to decide for themselves what's the best way to achieve the desired outcome.

Be clear on the timeframe and schedule milestones.

Milestones are a great way to ensure that if the job falls behind schedule, you'll know about it before it's too late.

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RELEGATE AUTHORITY

When delegating, you need to make sure that the assignee has the required authority and all the resources they need to get the task or assignment done. This is often referred to as empowerment.

There are three questions you can ask yourself to check that empowerment is sufficient:

1. **Does the assignee have the decision-making authority required to carry out the task, activity, or responsibility?** Have you made clear to the assignee what are the limits to his or her authority?
2. **Does everyone who needs to, know that the assignee is now responsible for this task or activity?** This is important, so that the assignee get's whatever cooperation and support they are going to need from others in the organization.
3. **Does the assignee have access to the resources they'll require?** It's easy to forget this, or take it for granted, so best to list down the things that you would need to do this job yourself, and then ask, does the assignee have access to these things too?

PROVIDE BACK UP

First, ensure that the assignee is aware that they should ask for help and support if they need it, and let them know the best time(s) and the channel(s) they should use to get that help and support.

Next, discuss potential "hazards and roadblocks" and possible solutions if problems do arise. Share your experience of what things might go wrong or where challenges might be encountered and offer advice for how to meet and overcome them.


Lastly, **schedule milestones and briefings to review progress.**

It's important to keep track of things so that you can intervene if necessary, before potential problems arise or get out of hand.

Within acceptable limits you should give as much leeway as you can without jeopardizing value or risking a negative impact on the organization.

A major purpose of delegation is the development of the assignee, and making mistakes (and correcting them) is a major factor in successful learning.

SCHEDULE FOLLOW UP

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It's important to be proactive, and not to wait for the assignee to ask for help, because sometimes they won't.

Check early and regularly to make sure things are on track. The more important the task, the earlier and more often you should check on progress.

Keep track of tasks delegated in your time management system, and schedule regular follow-up.

In some cases, a simple, "How's it going?" might suffice, but you may get a "Fine" when things are not. Fear, embarrassment, false pride, or defensiveness might stand in the way of you hearing about trouble that's brewing.

It's better to ask a few targeted questions to find out more precisely how things stand, and if it's appropriate, take a look at any already completed material or drafts.

When reviewing work, whether a progress check or a final submission or completed task, **it's extremely important to not accept sub-standard work.**

An organization that accepts sub-standard performance from its team members will get more of it.

If you check progress early and regularly, you can head off poor performance and make sure quality standards are high.

Finally, **make sure you reward good work.**

Gratitude for a job well done is always appreciated. On the other hand, a lack of acknowledgment and reward for effort and achievement can be very demotivating.


Barriers to Effective Delegation

Perhaps the most common reason why leaders don't delegate is because they are convinced that **they need to be "Hands On"**.

Some leaders pride themselves in being "Hands-on", others feel that they need to be in order to be seen to be doing their job. Still others like to be hands-on because they feel inadequate if they're not "on the line".

The truth is, leaders need to be hands-on sometimes, but not always.

Leadership, by its nature, means spending time analyzing, creating, planning, devising strategy, and other "hands-off" responsibilities.

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As a leader, you should be hands-on as much as you need to be, but as little as possible. And the time you spend being hands-on should lessen over time, as you develop the capabilities of your team.

Another reason often given by people who don't delegate is:

"I enjoy doing it myself"

Everybody has a tendency to do what they're best at and most enjoy.

Some leaders, especially newly promoted managers, continue to do what they did in their old position, even though in the new role they could and should be delegating these tasks, and focusing on what the new role requires of them.

Remember, your role as leader requires that you master and execute on your essential responsibilities.

You can't do that if you're focusing on the things you enjoy, but could rightly delegate to others on the organization.

Then there's the classic excuse for not delegating:

"I don't have time."

Many leaders make the mistake of focusing only on the short term. This is especially true of very busy or overloaded managers.

They think they don't have time to delegate. They feel it's a hassle to explain, train, and guide others and just plain quicker to "do it myself".

In the long term, this is self-defeating.

In reality, the busier you are, the more it's true that *you don't have time not to delegate*.

Every minute invested in properly delegating to a worthy report frees up multiple hours of future time, and, importantly, increases the overall productivity of the organization.


Another reason for not delegating is understandable and even endearing, but none the less needs to be overcome:

"It's a crap job, but somebody has got to do it"

Some tasks are drudgery; it's part of life.

In organizations, the grunt work should be done by the cheapest capable resource. That's putting it in text-book style language, but it's true.

None the less, the "resources" we're talking about are fellow human beings, so menial tasks should be shared around if possible, or assigned to people who enjoy them – some people do.

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But don't always delegate small things just because you can. Wash your own coffee cup, empty your waste paper basket – it'll be noticed and appreciated.

And for one-off jobs that everyone's going to hate, consider pitching in. Getting a difficult or unwelcome project done together is great for building esprit de corps, and you are a vital part of the team.

The same goes for crisis management. When the sh*t hits the fan, you need to be on the front line.

The last, and perhaps most oft-used excuse for not delegating:


"I can do it better myself"

Some people rationalize not delegating because they think they can do it better.

That may well be true (though you might be surprised), but not everything needs to be exactly as you would have it. Some things don't need to be perfect, just adequate.

And there are usually many ways to achieve the same outcome.

In truly critical areas where you doubt the quality achievable if you delegate, work in partnership. Take a mentoring approach; delegate only parts of the task and supervise closely.

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