

## What it is

A method for handing off work to others

## What it can do

This tool can assist you to:

- Better manage your workload
- Help develop your people through skillful giving of assignments
- Become more skillful in delegating

## When to use it

Whenever you are giving assignments or handing off work to others

## How it works

Read the article to learn about:

- Why to Delegate
- Who to Delegate to
- How to Delegate – 11 Best Practices
- 4 Barriers to Good Delegation

Use the checklist when delegating to implement the best practices.

Perhaps the most chronic complaint we hear from leaders is, *"I have too much to do!"*

Successful delegating is not just the key to a sustainable workload. It's also a valuable opportunity to develop the people who work for you, and ultimately, your success and legacy as a leader. However if it's not done skillfully, the process of delegation can be the source of considerable frustration for both leaders and staff.

One study showed that only 30% of managers believe they delegate well, but of those, two in three of the people to whom they delegate disagree with that self-assessment. This suggests that only about one in 10 managers know how to delegate successfully in a way that empowers others.<sup>1</sup>

This tool and checklist are designed to help you hand off work in ways that deliver the results you want while leaving everyone feeling good about the process.

## 6 GOOD REASONS TO DELEGATE

1. Manage and reduce your overall workload.
2. Stay focused on your priority responsibilities most critical to mission success.
3. Others can do it just as well as you.
4. Others can even do it better than you.
5. Provide opportunities for others that boost engagement and morale.
6. Develop the skills and abilities of your people.

While 'developing your people' appears last on this list, it is one of the most critical leadership responsibilities, and delegating tasks is a major opportunity to cultivate talent.

## WHO TO DELEGATE TO – THE 4 CRITERIA

1. **Skills:** someone with the requisite ability to do the job
2. **Availability:** someone with sufficient bandwidth (i.e. don't manage your overload by dumping work on overloaded staff.)  
When delegating, you may need to take something of equivalent time/energy off peoples' task lists.
3. **Appetite:** when possible, someone who would like the assignment
4. **Capacity building:** someone whose development would be served by the assignment

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<sup>1</sup> <http://www.forbes.com/sites/martinzwilling/2013/10/02/how-to-delegate-more-effectively-in-your-business/>

## 4 BARRIERS TO GOOD DELEGATION

### 1. Trust

This is a major impediment for many leaders. We fear that others won't do it as well as us. Well—possibly they won't. But the reality is, it's delegate or drown in too many things to do. If your lack of trust is reinforced by repeated poor results, first look at how to improve your delegating through the following 11 best practices. But also be willing to look at whether or not you have the right people in the right positions.

### 2. Fear of being replaceable

Alternatively, we may be concerned that they'll do too good a job and that they'll somehow show us up. Remember that a big part of a leader's job is to bring out the best in your people. Your delegatee's success is a measure of your success.

### 3. Perfectionism

Many of us plague ourselves and others with excessively high performance standards. Position the delegatee for success by setting standards that are achievable while being good enough to ensure the needed results.

### 4. Impatience

It takes time to do a skillful hand-off. On any given day when we are racing through our to-do list, it often seems easier just to do things ourselves. But, remember this phrase: *"I was so busy mopping up the floor, I forgot to turn off the spigot!"* Delegating is a critical practice for your own sustainability, the development of your staff development, and building capacity for your organization.

## HOW TO DELEGATE – 11 BEST PRACTICES

You may be thinking, *"I just want to hand off a piece of work. Do I really need to remember 11 best practices?"* Yes!

The failure of leaders to take care with hand-offs leads to fumbles, failures and frustration. The extra time and energy spent in delegating skillfully pays off over time, while taking shortcuts will likely leave you dissatisfied with the results, having to redo the task, damaging morale and trust, and leaving you reluctant to delegate work in the future.

### 1. Deal with any ambivalence before handing off

Carrying your lack of trust, fear of being replaced, perfectionism, or impatience into the delegation process is a recipe for poor results.

## 2. Establish Clear Expectations.

Confusion about delegation often looks like this:

Manager: “Go get me a rock.” Person comes back with a brown rock.

Manager: “Actually, I want a black rock.” Person comes back with a black rock.

Manager: “But I wanted a large black rock.” Then, when the person comes back with a large black rock, the manager realizes that the rock really needs to be smooth.

A hand-off should always make the following completely clear:

- **Purpose/context**  
Make sure the delegatee understands the purpose of the task and has sufficient context.
- **Deliverables/Quality standards**  
What are the exactly outcomes/deliverables of the task and by what standards will satisfaction with the completed task be judged?
- **Process requirements**  
Are there any requirements for how the task is to be completed? (e.g. “You must consult with the communications department.” Or, “There needs to be a project plan for this that everyone can refer to.”)
- **Delivery date**  
Make sure it’s realistic, considering not only the nature of the task but other existing priorities of the delegatee.

## 3. When possible, delegate complete tasks rather than pieces of a task.

This tends to create greater ownership and engagement while reducing the delegatee’s need to keep checking back with you, and vice versa.

## 4. Delegate the goal not the process.

People need to have latitude to accomplish goals in the way they think is best. If you do have specific process requirements, be clear about them up front but think first about whether they are truly necessary to dictate.

## 5. Delegate adequate authority along with the task.

This may require appropriate positioning, i.e. making it clear to relevant parties that this person has the authority. Also, make it very clear if there are limits to the scope of decision-making (e.g. check with me if...)

## 6. Make sure there are adequate resources and support.

Be proactive to ensure the conditions for success are present, rather than waiting for slow-downs or breakdowns to intervene. Make sure to find out what the delegatee thinks they need to be successful. This up-front investment will prevent costly mistakes.

## 7. Check for understanding and buy-in.

Just saying what you want is not sufficient. Make sure the hand-off is received – that you and the person receiving the assignment actually share the same understanding of the task, deliverables and quality standards, and that the delegatee is aligned and committed to its success.

The person's desire to please you may impede honest communication about this. Watch for and address any signs of ambivalence or concern about the assignment.

## 8. Anticipate pitfalls.

Together, think through potential challenges and roadblocks before they happen, and what may be required to address them.

## 9. Establish check-ins.

You need to find the right balance of allowing autonomy and appropriate monitoring, which will vary depending on the nature of the task, your level of confidence in the delegatee, and their needs and requests. Identify and agree on key milestones and scheduled check-ins. You also want to be available between agreed-upon check-ins as needed.

## 10. Be prepared to let people make mistakes.

You will often be delegating tasks that are growth opportunities for your people. Encourage delegates to learn from their missteps and press forward, as this is fundamental to developing new skills. Your check-ins and limits on the scope of decision-making are your safeguards against mistakes that might cause unacceptable harm.

## 11. Be prepared to offer acknowledgement and credit

Be generous in your appreciation. Studies have shown that the number one reason people leave their jobs is a lack of recognition and praise.<sup>2</sup> Also, make sure that people get appropriate credit within the organization for the tasks that you delegate.

## IN CONCLUSION

Excellent delegating requires more than a series of mechanical steps. You will need to adjust your style and methods to meet the unique needs of the task at hand and the human being to whom you delegate. Delegating necessitates good two-way communication. Make sure you find out what your partner needs in order to feel positioned for success. And don't forget to ask for feedback to improve your skills in handing off work.

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<sup>2</sup> <http://www.qualitydigest.com/aug95/newsdig.html>

Use the following checklist to help you master the Art of Delegating.

## THE ART OF DELEGATING CHECKLIST

1. **Deal with any of your own ambivalence about delegating before handing off**
2. **Delegate with clear expectations.**
  - Purpose/context
  - Exact deliverables/outcomes and quality standards
  - Process requirements
  - Delivery date
3. **When possible, delegate complete tasks rather than pieces of a task.**
4. **Delegate the goal not the process.**  
The goal or desired outcome of this task:
5. **Delegate adequate authority along with the task.**  
What decision-making power do they need to be effective?
6. **Make sure there are adequate resources and support.**  
(Check to see what the delegatee thinks they need.)
7. **Check for understanding and buy-in.**
  - Give thorough download of task
  - Check for understanding
  - Forthrightly address any signs of concern or low commitment from the delegatee.
8. **Anticipate pitfalls.**  
Potential pitfall:  
Proposed solution:  
  
Potential pitfall:  
Proposed solution:  
  
Potential pitfall:  
Proposed solution:
9. **Establish check-ins tied to agreed upon milestones.**  
Milestone, date:  
  
Milestone, date:  
  
Milestone, date:
10. **Be prepared to let people make mistakes.**  
Remember to treat minor mistakes as learning opportunities.
11. **Be prepared to offer acknowledgement and credit.**