

How to Delegate

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The "How to Delegate" Workbook

Introduced by Mind Tools CEO, James Manktelow



Delegation is fundamental to any business; without it, an organization won't grow. I've learned this important lesson firsthand at Mind Tools and in previous businesses.

When you start a company, especially if you do it without the assistance of venture capitalists, you do everything yourself. You work incredibly long hours and try to stay on top of every little detail. It's an exhilarating and often exhausting experience!

However, once things start to take off, there's only so much that you can do on your own. You might perform core tasks well, but you'll find

yourself fumbling new opportunities, simply because you don't have enough time to take advantage of them.

This is when you need to start hiring and delegating!

Finance often comes first. You find a reliable bookkeeper, and a lot of difficult administration goes away. You look at the other jobs you do, and you package them up so that someone else can take them on. You look at the tasks that don't play to your strengths, and you find people who are good at those. And, you hire exceptional specialists for highly skilled roles.

As you delegate, your business grows faster. New opportunities arise, so you hire, you package work up, and you delegate some more. If your market is big enough, you grow fast. It gets exciting!

Mind Tools has grown through careful hiring, and sometimes quite frantic delegation, and this is just one example of how delegation skills are useful. However, these skills benefit everyone, whether you've just started your career, you manage a small team, or you plan to start your own business. You can't do everything yourself, and, although you might think you can do it all faster or better, the truth is that much of the time, it's far more efficient to share the load.

The good news is that delegation is a skill you can learn, just like anything else, and this workbook shows you how.

In just a few hours, you'll learn what delegation can do for you and, even more importantly, how to delegate the right tasks to the right people, so that everyone benefits.

Then, by the end of the workbook, you'll be ready to hand over your first delegated task.

Enjoy using the workbook!

A handwritten signature in black ink that reads "James". The signature is written in a cursive style with a large initial 'J'.

James Manktelow
CEO
MindTools.com

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Introduction

Welcome to the "How to Delegate" Workbook From Mind Tools

The inability to delegate is one of the biggest problems I see with managers at all levels.

– Eli Broad, American entrepreneur and philanthropist.

Do any of these points sound familiar?

- You'd like more time in your day.
- You're often one of the first ones into the office, yet also often the last to leave.
- You feel stressed and overloaded.
- Your day is full of to-dos and commitments, and no matter how hard or fast you work, you never seem to get it all done.
- You feel like you've stalled out in your career, because you can't seem to move forward or take time out to work on new projects and goals.
- You sometimes work weekends and evenings to catch up with work.
- You avoid taking time off because you have so much to do.

If any of these statements apply to you, then you would probably benefit from delegating some of your workload.

No matter how successful we are in our careers, we can't do it all, nor should we! There's a limit to what we can do in the time we have available. However, the reality is that many people do try to do it all. This leads to work overload, long working hours, and a sense of pressure. And, of course, we never do get everything done!

This means that it's those of us who learn to delegate effectively who get ahead in our careers, and get to leave the office on time.

The ability to delegate well allows us to focus on high-value activities. This is crucial, especially as we advance in our careers and start to take on larger projects. Delegation also gives the people on our teams the chance to grow their skills and test their abilities. It's truly a win-win!

However, delegation doesn't come naturally to many of us. We may have trouble "letting go," because we think that we're the only people who can get the job done. Or, we think that it will take longer to explain how to do something than it will take to do it ourselves.

This workbook shows you how to delegate effectively. The first module looks at how to overcome the excuses and obstacles that prevent people from delegating

their work. Then, in module 2, we identify which tasks and projects you can delegate – and which ones you can't.

In module 3, we explore how to choose the right people to delegate to, based on their ability to do the job, and their current circumstances. Finally, in the fourth module, we deal with the "how to" of delegation – handing over work and monitoring progress.

Once you've completed these modules, you'll have a plan in place for delegating your first task or project, and you'll have the knowledge and the tools you need to feel comfortable and confident when you hand jobs over to others.

How to use This Workbook

This workbook will take a few hours to complete. You can either type your answers directly into this PDF, or print it out and work through it on paper.

Either way, use it as the place to record your answers to the exercises. (If you type your answers directly into the workbook, you'll be able to save them and come back to them easily in the future.)

Like all learning opportunities, the effort you put in will determine how much you get out of the process. Try to schedule plenty of time to work on the material, and set yourself up in an environment where others won't disturb you.

Action:

To think about your experiences of delegation, answer the questions below.



When did you last delegate a major task? What was the outcome? What could you improve about the way you did this?

--

Think of a time when someone delegated a task to you effectively. What factors contributed to the success of this?

--

Now think of a time when someone delegated a task to you and the experience was not positive. What was the problem? What lessons can you learn from the experience?

Action:



What high-value tasks could you spend more time on if you could delegate more of your workload? List these in the box below.

1. Removing Obstacles to Delegation

The best executive is the one who has sense enough to pick good men to do what he wants done, and self-restraint enough to keep from meddling with them while they do it.

– Theodore Roosevelt, American president.

Although you might love the idea of having a lighter workload, the thought of passing control over to others might be daunting. You might also think that delegation is more hassle than it's worth.

In this first module of the workbook, we'll highlight some of the common excuses people use to avoid delegating. Plus, we'll look at how to overcome micromanagement and perfectionism: two stumbling blocks that can easily prevent you from letting go.

1.1. Common Delegation Excuses

To delegate effectively, it's important to understand why you might avoid it in the first place. Here are several common excuses that people use to avoid delegation.

Excuse #1: Delegating Takes too Long

When you're overloaded with work, you probably don't want to take time out of your schedule to show someone else how to do a task that would take you just a short time to complete.

It's true that delegation does require an up-front investment of time. You have to show someone else how to complete a task that you may be able to do almost without thinking. However, your initial investment will pay off down the road. When this same task comes up again, it will require less time and effort on your part, since the other person now knows how to do it.

Excuse #2: The Other Person Won't Complete the job Correctly

Many people avoid delegating because they're afraid that the person they're delegating to won't complete the task correctly, or with the same level of quality as they would themselves.

While this concern is valid, you can avoid this problem by giving the other person enough guidance and support, and by communicating your expectations about the task. We look at how to do this in module 4.

Excuse #3: I'm the Only Person who can do This

Everyone wants to feel indispensable at work. However, you shouldn't think that you're the only person who can competently complete all of your tasks. You might be the only one doing these jobs, but this doesn't mean that you can't pass on your knowledge and skills to others.

Remember, both you and the people you delegate to will benefit from this: you free up your time to focus on high-value tasks (and thus make yourself more valuable to your organization), while others learn new skills that can aid them in their own careers.

Excuse #4: I Should do This Task Because I'm Good at It

Most of the time, the tasks that you should delegate first are the ones that you've already mastered. Therefore, it's tempting to want to hang on to these tasks, because you know how to do them inside and out. You might even find them easy.

However, these routine tasks don't grow your knowledge and skills, so the longer you do them, the less progress you'll make in your career. They might even stop you from working on new projects and objectives that you need to complete to help your organization to grow.

Let go of the notion that you have to do it all. You'll be more valuable to your company, and you'll create greater opportunities by delegating the tasks you know well and putting your skills to work in new ways. Delegation will also allow you to avoid getting "stuck in a rut" in your career.



Action:

Answer the questions below to look more deeply at your fears around delegation.

What excuses do you make to avoid delegation?

Why do you think you make these excuses? What are you afraid of?

1.2. Recognizing and Overcoming Micromanagement

Many people fear losing complete control of a task or project if they have responsibility for it. This is especially true of micromanagers.

Micromanagers have a difficult time with delegation because they simply don't trust others to do a job correctly, without constant supervision. If this applies to you, you'll need to recognize that you're a micromanager before you delegate any of your tasks. There's no point handing over control to others and then hovering over them to ensure that they do a good job!

Action:

To identify whether you have the tendency to micromanage, answer the following questions by checking "yes" or "no."



Question	Yes	No
Do you feel compelled to stay in control of a task or project at all times?		
Do you check in with team members frequently, almost compulsively, to monitor progress and check for mistakes?		
Do you discourage team members from making even minor decisions on their own, without consulting you first?		
Do you get involved in team members' work or projects without telling them?		
Do you have trouble taking time off work?		
Do people tell you that you're a micromanager?		
Total cells checked:		

How did you do? The more “yes” answers you gave, the more likely you are to micromanage people!

If you’re a micromanager, the good news is that delegating more of your work is a key strategy for improving your management skills and cutting down on stress. So, you’ve taken a major step in dealing with this negative trait by working through this workbook.

1.3. Overcoming Perfectionism

Another common obstacle to delegation is perfectionism. This can be a self-defeating thought pattern that pushes you to achieve unrealistically high goals and spend time completing work so that it is 100 percent “perfect,” even when this isn’t necessary. (Sure, “perfectionism” is essential in some situations, but it’s harmful in others.) If you’re a perfectionist, you’ll likely have a difficult time with delegation, because you won’t trust someone else to complete a task to your “perfect” standards.

There are two types of perfectionism:

1. **Adaptive perfectionism:** With adaptive perfectionism, you continually work on developing your and your people’s skills. Your standards are always rising, and you approach work with optimism, pleasure and a desire to improve. This is a healthy type of perfectionism, just as long as you’re focusing on work that really matters to your organization’s mission.
2. **Maladaptive perfectionism:** With this type of perfectionism, you are rarely satisfied with what you and the people you manage produce. If something isn’t perfect, you dismiss it. You may experience fear of failure, doubt, unhappiness, and other painful emotions. This is a negative type of perfectionism, and it’s particularly harmful when it’s focused on work that doesn’t make much of a difference to your organization.

Here are some signs of maladaptive perfectionism:

- If you can’t be the best at something, you may give up or don’t try.
- You see any mistake as a failure rather than as a chance to learn and grow.
- You feel upset or uncomfortable when you or your team members don’t complete “perfect” work.
- You don’t enjoy the process of learning new skills and developing your people: you care only about the result.
- You don’t like taking risks, especially when there is no guarantee that you’ll do a task perfectly. Instead, you stick with safe or well-known tasks that you’ve already mastered.
- You care deeply about what others think of you.
- You don’t handle criticism well.
- You expect others to meet your excessive standards. When team members and colleagues don’t meet these expectations, you get critical.

If you find yourself nodding your head at any of the signs above, it’s important that you take steps to overcome this tendency. Delegation will be all but impossible if you don’t!



Action:

Do you show any of the signs of maladaptive perfectionism? List these behaviors in the box below.

--



Action:

If you think that you're a maladaptive perfectionist, work through these steps to challenge your behavior:

1. List two routine activities or tasks that you do at work that you believe need to be perfect. Write these in the appropriate rows in the first column of the table on the next page.
2. In the next columns, write down why you believe these activities need to be perfect.
3. Finally, write down what would happen if you delegated these tasks to people on your team. What would be the probable outcome if you gave them appropriate guidance and support while they did the task instead. (Chances are, you won't experience any negative consequences!)

Task/Activity	Beliefs	Probable Outcome
1.		
2.		

Other Ways of Dealing With Maladaptive Perfectionism

You can also use the following strategies to deal with perfectionism:

Set Realistic Goals for Yourself and Your Team

Perfectionists often set goals so high that there's little hope of achieving them. Instead, learn how to set realistic goals. Come up with several long-term goals and then break them down into achievable yearly and monthly goals.

Also, whenever you feel anxious, unhappy or scared about delegating tasks to others, ask yourself whether you've set your expectations too high. On reflection, you may find that you're expecting too much.

Don't Fear Mistakes

Mistakes are part of life. They can even provide rich learning experiences, if you have the courage to examine them.

Make a real effort to learn from each mistake that you and your people make – you'll all grow as a result.

Focus on the Whole

Perfectionists often exhibit "tunnel vision": they focus on one small part of something and ignore the rest. For instance, if you've delegated a task to someone, you might be annoyed that he struggled to understand it, while ignoring the fact that he's done lots of other good work recently.

Challenge this tendency by making an effort to look at what went well. Don't focus exclusively on the negative!



Action:

Think of a recent mistake that you or a team member made. Then, in the box below, write down one positive thing that came out of the experience.

Mistake:	

1.4. Concluding This Module

In this module, we've looked at the excuses you might use to avoid delegating. We also saw how to recognize and overcome two behavioral traits – micromanagement and perfectionism – that can make it difficult for you to delegate.

The next module helps you decide which tasks you can delegate, and when you should delegate them. We'll also identify which activities you should continue to do yourself.



Action:

Look back through this module and identify the three biggest obstacles that you need to overcome to delegate effectively. Write these in the box below.

1.
2.
3.

2. Choosing What to Delegate

Now that you've identified and learned how to overcome obstacles that might have prevented you from delegating in the past, it's time to focus on what tasks you should delegate.

This is an important step, because there will certainly be some activities that you should perform yourself: they require your expertise, skills and judgment. You bring a great deal of value to your team and organization when you focus your energy in these areas.

For example, you probably can't delegate tasks such as recruitment and performance management, and you likely can't ask team members to develop a new strategy for your department. However, you could easily delegate other tasks, such as routine reporting or the preparation of monthly newsletters, to someone else.

You also need to bear in mind that there are certain times when it's not smart to delegate: for example, when a deadline is imminent or when you need the learning experience yourself. We'll look at these issues in greater detail in this module.

2.1. Identifying Routine Tasks and Activities

To determine what you can and can't delegate, you first need to identify the tasks and activities that you perform on a regular basis.

This can include routine tasks, such as checking email and returning phone calls, to more complex activities, such as writing a monthly budget report or arranging meetings with new clients.

Once you've identified your regular tasks, it's easier to identify good candidates for delegation.

Action:

Brainstorm the tasks and activities that you do regularly (daily, weekly, monthly and so on) and write them in the "Tasks" column in the Delegation Log on the next page. Refer to your job description and your [To-Do List](#) or [Action Program](#) to make sure that you identify as many tasks as possible.

Then, estimate the amount of time you spend doing each task and write this in the "Time Spent" column. (Ignore the other columns for now.)



Tip:

If you have trouble identifying all of the tasks that you spend time on, keep an Activity Log for a week or two. When you write down what you work on throughout the day, you can identify tasks that you might not otherwise think of.

2.2. Identifying What you can Delegate

You now have a comprehensive list of your routine tasks. Next, you need to determine which of these you can and can't delegate to someone else.

Effective managers aren't afraid to delegate. However, there are times when it isn't a good idea. It's often best not to delegate tasks with the following characteristics:

- They have unclear objectives or deadlines.
- The stakes are particularly high.
- They offer you an enriching learning experience or a chance to grow your skills.
- They rely on your unique strengths, talents, expertise, or level of authority for a successful outcome.

Action:

In the box below, write down up to five of the most important contributions you make to your organization. These should be high-value activities that rely on your unique strengths, talents, expertise, or level of authority.



1.
2.
3.
4.
5.

The last exercise will give you an idea of the types of tasks that you shouldn't delegate. However, there will likely be several tasks that you can delegate easily. They will include:

- Administrative or clerical tasks: drafting reports, completing paperwork, gathering data, and so on.
- Standardized decisions and tasks.
- Tasks that follow set processes or well-defined rules.
- Tasks that others handle while you're on vacation.
- Tasks that will aid other people's development.



Action:

Go back to your Delegation Log on page 12 and check the appropriate box for each task. The options are:

- **All:** You can hand over all authority to complete the task.
- **Some:** You retain authority for the task, but someone else can do the bulk of the work.
- **None:** Only you should complete the task.

Tip:

To find out how to document tasks that follow well-defined processes, see our articles on [Writing a Procedure](#), [Flow Charts](#) and [Swim-Lane Diagrams](#).

2.3. Concluding This Module

You now know which tasks and activities you can and can't delegate. The next step is to choose the right people to delegate to. That's what we'll focus on in the next module.



Action:

Look back at your Delegation Log on page 12 and choose the three tasks or activities that you should delegate first. Write them in the box below.

1.
2.
3.

3. Choosing People to Delegate to

You now have a good understanding of what tasks you can and can't delegate, and you know how to overcome the obstacles that get in the way of effective delegation.

This module looks at how to choose people to delegate to. Everyone on your team has unique strengths, knowledge and skills. When you choose the right people, it's more likely that they will do the tasks well and benefit from the experience.

Remember, one of your most important responsibilities as a manager is to develop your team members. Delegation is a great way to do this; however, choosing the right person is critical.

This module also looks at how you can develop people's self-confidence. After all, your team members need to believe that they can do a good job when you hand them a new challenge.

3.1. Scoping the Task

Before you choose people to delegate to, you need to make sure that you have a thorough understanding of the skills, knowledge and competencies needed for the task.

Action:

Choose one of the tasks that you identified at the end of the last module on page 14, and write it in the table on the next page.

Next, think carefully about the knowledge and skills needed to complete the task successfully. List these in the next box.

Then think about the personal competencies needed for the task. For example, do you need someone who can work well on his or her own, or someone who pays careful attention to detail? Write this down as well.



Task to be Delegated:	
Skills and Knowledge Required:	
Personal Competencies Required:	

3.2. Picking the Right Person

Now that you have a better understanding of the task at hand, you can pick a person to delegate it to.

To do this, you need to assess potential delegates on five criteria:

1. Organizational level.
2. Match with strengths and skills.
3. Development potential.
4. Current workload.
5. Reliability.

Let's look at each criterion in more detail.

1. Organizational Level

The person you delegate a task to should be the one who has the ability to do a good job, but has the lowest level of overall responsibility in the organization. Generally, that means that his or her time will not be better spent doing other things.

For instance, Juan is a team leader and Linda has no direct reports. Both can do the task, but Linda is likely to be a better choice because this leaves Juan more time to deal with higher-value tasks.

2. Match With Strengths and Skills

When you assign work, try to match tasks with people's strengths and skills. For example, if the task involves writing reports, it makes sense to give it to someone who has good writing skills.

3. Development Potential

When you determine someone to delegate a task to, think about the impact that it'll have on the person's job satisfaction and personal development.

For instance, if you know that someone wants to progress to a certain role or has an interest in any of the tasks that you want to delegate, then try to accommodate those interests through delegation.

4. Current Workload

Clearly, it's important to consider the amount of work that the person is already doing. One of the aims of delegation is to improve productivity and job satisfaction, so don't overburden people.

5. Reliability

Some people are more reliable than others. If the task that you want to delegate requires urgent work or has a high profile, then it's best to delegate it to someone who you know will do a good job. (Once you've delegated a task, you still have ultimate responsibility for it, so you need to make sure that you don't regret delegating it.)



Action:

On the Delegate Suitability Assessment table on the next page, list the people you could delegate your chosen task to.

Then, score them against each of the criteria as follows:

Organizational Level

- 3 = Administrative/process oriented.
- 2 = Supervisor responsibilities.
- 1 = Management responsibilities.

Match With Strengths and Skills

- 3 = Excellent match with strengths and skills.
- 2 = Moderate match with strengths and skills.
- 1 = Poor match with strengths and skills.

Development Potential

- 3 = Excellent fit with goals and interests.
- 2 = Moderate fit with goals and interests.
- 1 = Poor fit with goals and interests.

Current Workload

- 3 = Has a lot of capacity for more tasks.
- 2 = Has some capacity for more tasks.
- 1 = Does not have capacity for more tasks.

Reliability

- 3 = High reliability.
- 2 = Moderate reliability.
- 1 = Low reliability.

Delegate Suitability Assessment Table

Person	Org. Level	Strengths	Potential	Workload	Reliability

The higher the score, the better fit the person is for the task.

Tip 1:

It can be useful to give people on your team a [Training Needs Assessment](#) before you start to delegate tasks. This will allow you to identify skill gaps in advance, so that you can take steps now to address them. It will also help you identify what tasks you could delegate to help them develop relevant skills.

Tip 2:

If you don't have anyone on your team who is a good match for a task that you want to delegate, consider hiring a [freelancer](#) or [contractor](#).

Many websites can connect you with freelancers and contract workers. Some of these sites include [Elance](#), [Guru](#) and [oDesk](#). You can also use your personal network or [LinkedIn](#) to find assistance.

However, as with delegation, not all tasks are suitable for outsourcing. Use the [Outsourcing Decision Matrix](#) to make sure that the task or job is one that you should outsource.

3.3. Building People's Confidence

Sometimes, people might shy away from accepting more responsibility because they lack the confidence that they'll be able to handle the task.

This is why it's important to take steps to build up the self-confidence in your team. Confident team members are more likely to see opportunities in the tasks you delegate. They're also more likely to reach their full potential in their careers.

You can do several things to build confidence in other people:

Develop Their Knowledge and Skills

When you use your strongest skills to accomplish tasks, you naturally feel more confident. The same goes for your team members: the stronger their skills are, the more confident they'll be that they can accomplish tasks.

Give your team members plenty of opportunities to learn and grow, and provide training opportunities whenever you can. As we've already highlighted, you could also shape their learning around some of the tasks you plan to delegate in the future.

Set Clear Goals

Many people get confidence from completing tasks and projects successfully. But this only comes if people know what it is that they're supposed to do.

This is why it is so important to [set clear goals for every member of your team](#). Goals define success and give people an objective to shoot for. Without them, they work aimlessly, and they won't be able to recognize success.

So make sure that the people on your team know what goals they're supposed to work toward. Then use delegation to help them accomplish these goals.

Then, when they reach even small milestones, celebrate their achievements and remind them how well they've done. This will boost their confidence and encourage them to take on bigger and better projects in the future.

Identify Low-Confidence Triggers

Some situations instantly cause our confidence to waver. For example, someone might feel confident almost all the time, except when he has to make telephone calls. Another person might only lack confidence when she has to research competitors' services.

Work with your team members to identify their unique "trigger situations." To do this, sit down with them one-on-one and divide a piece of paper into two columns. In one column, ask them to list the situations that make them feel confident and get them to explain why they are confident in this situation. What knowledge and skills do they use that make them feel good?

In the other column, list the situations that don't make them feel confident. Why don't they feel confident? What knowledge or skills would give them greater confidence in these situations, and how could you use delegation to build their knowledge or skills in these areas?

Show That you Believe in Them

Do your team members know that you want them to take on additional work?

Encouraging people to take on more responsibility through delegation can be a great way to boost confidence. But you need to make it clear that you believe in their abilities, and that you're confident they can handle increased responsibilities.

Talk to your team members and let them know you trust them to take on more work. This might be all that some people need to accept additional tasks and projects with confidence.



Action:

List several of your team members in the table below. Then, come up with some ways that you can build each person's confidence with delegation.

Team Member	Confidence-Building Strategy
1.	
2.	
3.	

3.4. Concluding This Module

In this module, we looked at how to choose the best person to delegate a particular task to. Remember, the goal is to match each task to a person's interests, strengths and talents, so that they excel with the new responsibility, and so that they develop their skills and get the confidence they need to succeed.

The next module guides you through the "how" of delegation. We'll examine a process you can use to delegate a task, and we'll discuss how you can monitor the work you assign, so that you retain the right amount of control.



Action:

Look back at the Delegate Suitability Assessment Table that you completed on page 18, and choose the best person for the task that you chose on page 16 (end of section 3.1.).

Then, answer the questions below.

The task I plan to delegate is...
The person I plan to delegate this task to is...
What knowledge or skills will allow him or her to accomplish this task successfully?

Does he or she have any knowledge or skills gaps?

If so, how will I address these gaps?

What strategies can I use to boost this person's self-confidence as I delegate this task to him or her?

4. The "How" of Delegation

Never tell people how to do things. Tell them what to do and they will surprise you with their ingenuity.

– General George S. Patton, Jr.

Now that you understand what tasks and activities you can delegate, and you've identified the right team members to delegate work to, it's time to assign work to them.

This can be challenging, since you now have to hand over control to someone else. However, it's much easier to do if you put in the groundwork first.

4.1. Developing a Delegation Plan

So, you now know what tasks you want to delegate. But how will you communicate what people need to do and what their objectives are? How much authority and/or responsibility will you hand over? And when will you check progress?

These are the types of questions that you address with your Delegation Plan. With it, you'll explain what others need to do, why they need to do it, and how they should do it.

We'll look at a step-by-step approach for developing this plan in this section of the workbook. You'll then have all the information you need to complete the Delegation Plan Template on pages 35 and 36.

Defining the Task

The first step is to define the outcome that you want when the person has completed the task.

As part of this step, it's important to identify the "why." When people know why they need to do something, it's much easier to fill in the gaps and make good decisions. For instance, if you know why you must create a presentation, it's much easier to decide what points to include.

You also need to identify the deadline for completing the task.



Action:

Using the task that you chose in section 3.1. on page 16, identify what the task is, its purpose/context, and its completion date.

Task (What)	
Purpose/Context (Why)	
Completion Date:	

Tip:

When you set a completion date, make sure that it's easy enough for you to make changes yourself if the person you're delegating to doesn't complete the work to the desired standard. That way, you can still hit the deadline reliably.

Identifying Milestones

The next step is to outline the subgoals of the task. This provides the person with specific milestones to reach, and it gives an overall sense of direction.

When you do this, make sure that the subgoals are measurable so that you can schedule time to review work done at each milestone. Also, include specific instructions on how to achieve subgoals, if appropriate. You may need to identify a completion date for each subgoal too.



Action:

Identify milestones for the task, by completing the table on the next page.

Milestones	Instructions	Deadline (if Appropriate)
1.		
2.		
3.		
4.		
5.		
6.		

Responsibility and Authority Level

Next, you need to decide whether you will provide direct supervision. If not, who will the person report to on a regular basis?

You also need to decide how much authority the person has for the task – although this person is always responsible for his work, you have ultimate accountability, and you’ll need to decide how much authority he has to make decisions.

Things to consider include the following:

- Does the person have a set budget to work with?
- Can he authorize incidental expenses?
- Can he assign work to others?

Action:

To define responsibility and authority levels for your task, complete the table on the next page.



Responsible to:
Extent of Authority:

Reporting/Following Up

Now you need to determine how the person will report the status of the project.

First, think about how much you trust this person's ability to deliver. Then, consider the following questions:

- How often should the person should update you (or his supervisor)?
- What and when do you want the person to report? For instance:
 - Do you have a checklist that you'd like the person to fill out?
 - Do you want to know before the person takes any action?
 - Do you want a verbal report at set times or when certain milestones have been reached?
 - Do you require a detailed summary of what the person has done?
 - Do you only want to know when the person has completed the task?
 - Do you only want to know if something goes wrong?
- Do you need advance notice to make sure that a required resource is in place?

Action:



Using the points above as guidance, complete the table below.

When to Refer Back:

Reporting – When and What:
Other Checkpoints:

Support and Resources

People will struggle to do a good job if they don't have the support and resources that they need.

For instance, will other people be involved with the same project, and will they need to work together at some point? Is additional training required? If so, who will provide it? Does the person need access to special equipment?

This also means that you hand over any work that you've done on the task already, and you make sure that you or someone else is available for guidance and advice when the person needs help.



Action:
 To identify what support and resources the person needs to do the task, complete the table below.

Support Needed:	Resources Needed:



Action:

Now, fill out the Delegation Plan Template on pages 35 and 36 for the task you've decided to delegate. This puts you in a great position to delegate the job well.

4.2. Handing Over the Task

Well done! You now have a detailed Delegation Plan. The next stage is to delegate the task to the person you selected.

How you delegate a task is an important part of the delegation process. If you simply bark off instructions and demand that the other person do the task by tomorrow, he will, quite understandably, feel resentful! However, if you openly express your needs and be clear about why you've chosen this person, he will likely be far more interested in taking on the delegated task.

Below, we've outlined a process you can use to delegate tasks to people.

1. Ask for Help

First, ask for the person's assistance in a pleasant manner. For example, "Hi, Paul. I could use your help with a task that I think you're well-suited for. Could we schedule some time to talk about it?"

Yes, you likely have authority over this person. But isn't it much nicer to ask for assistance than to tell people that they must do what you request?

2. Explain why you Need Their Assistance

When you meet with this person, detail what you would like him to do, and explain why you think he is suited to the task, drawing on the reasons you identified when you decided that he was a good fit for it. (We covered this in section 3.2.)

Above all, make sure that you explain what benefits he will get by taking on this task.

3. Delegate the Task

Finally, hand over the task by working through each section of your Delegation Plan with this person, so that he understands your expectations and deadlines.

Also, ask for his suggestions on how you could do the task better and amend the plan if necessary.



Action:

To think about how you'll delegate the task to the person you chose in section 3.4. (page 21), answer the following questions:

How will you approach this person for assistance? What will you say?
How will you explain that he or she is suited to the task that you plan to delegate? What reasons will you give?

Tip:

Bear in mind that not everyone will be happy to take on additional work. Be assertive if you need to be, but also be prepared to explore other options if people can't take the work on.

4.3. Monitoring Work and Maintaining Quality

Although the other person is responsible for the task once you've delegated it, you still need to monitor his work and ensure that it meets your expectations.

Stick to the checkpoints that you agreed on in your Delegation Plan, and meet with the person at these checkpoints to review progress thoroughly.

As you do this, it's important to provide constructive feedback on the person's performance. This feedback will encourage him to maintain or improve his performance, and it can also build the person's confidence as he continues to work on the task.

If possible, only accept good quality, complete work. If you accept work that you are dissatisfied with, your team member does not learn to do the job properly, and you take on extra work that you will probably need to complete yourself.

When the other person has finished with the task, give credit where credit is due. If your boss or other leaders compliment you on a job well done, let them know you had assistance.

It's also important to recognize and celebrate people's success when they complete a delegated task. This doesn't have to be a monetary reward: a heartfelt "thank you" and simple recognition is often reward enough.

4.4. Avoiding "Upward Delegation"

Upward delegation happens when people subtly pass the work you've delegated to them back to you. The process we've outlined will give you some automatic protection against upward delegation. These tips will also allow you to avoid it:

- If people approach you with a problem, discuss it, but don't let your team members transfer the problem to you. Coach them in handling it, but don't take on the burden of handling it yourself.
- Get team members into the habit of coming up with possible solutions to their problems before they approach you. They may not have the perfect solution, but if they come to you with suggestions, you might be able to assist them better. (People can be so much in the habit of getting assistance that they don't try to find their own solutions.)
- Shake off your own tendency to procrastinate on making a decision. Often, when the best solution to a situation is not obvious, it might be tempting to say, "Let me think about it and I'll get back to you." Then you're stuck with a problem, you've put the project on hold, and your team member is unlikely to use his or her initiative.

4.5. Concluding This Module

The process of delegating a task can be challenging for many people.

However, it's much easier when you use Delegation Plans to think about how to hand tasks over.

Monitoring people's work and maintaining quality is important too – you don't want to micromanage them, but you must ensure that they do a good job. So, make sure that you get the balance right!

Action:

Schedule a short handover meeting with the person you've chosen to delegate the task to. Write the date and time in the box below.



Date:	
Time:	

5. Moving On

Well done! You now have a thorough understanding of why delegation is important, you've identified tasks and activities that you can delegate, and you've now completed all the preliminary work for your first delegated task. All that's left is to hand it over.

You're well on your way to finding the time you need to focus on high-value projects, and empowering your team by passing on greater responsibilities.

Although you should now feel much more comfortable with delegation, it's still important to continue to develop these skills in the weeks and months to come. Look for opportunities to delegate more tasks. Then use the task templates that we've provided on pages 32-36 to guide your delegation. (Print off as many of these as you need.)

As you get more comfortable with delegation, the process will become intuitive. However, it's best to start by filling out the templates. That way, you will make sure that you cover all necessary details, and you'll have the confidence you need to give away the tasks that you've previously held onto.

At Mind Tools, we've worked hard to make this workbook as informative, practical and easy to use as possible. If you have any suggestions on how we can improve it for the future, then please let us know at customer.helpdesk@mindtools.com.

We hope that you enjoy using what you've learned in this workbook and that the skills you've developed here will continue to serve you well throughout your career.

Best wishes, and enjoy delegating!



James Manktelow
CEO
Mind Tools

Task Scoping Template (see Section 3.1.)

Task to be Delegated:
Skills and Knowledge Required:
Personal Competencies Required:

Delegate Suitability Assessment Table (see Section 3.2.)

Person	Org. Level	Strengths	Potential	Workload	Reliability

Delegation Plan Template (see Section 4.1.)

Team Member: _____

Manager: _____

Task (What)		
Purpose/Context (Why)		
Completion Date:		
Milestones	Instructions	Deadline (if Appropriate)
1.		
2.		
3.		
4.		
5.		
6.		

Responsible to:
Extent of Authority:
When to Refer Back:
Reporting – When and What:
Other Checkpoints:
Support Needed:
Resources Needed: