

# Planning Successful Delegation

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**Task:**

**Delegatee:**

**Why this? Why now? Why them?**

Why is the job or responsibility 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? Providing this context to the delegatee and to relevant others (delegatee's peers, others who will be working with the delegatee, etc.) can provide confidence in the new direction and can prevent speculation or doubt which can undermine success.

**Training and information needed:**

Is the delegatee capable of doing the task? Do they know how to do it or will they need training? Are they motivated to do it or will they need encouragement?

**Required results:**

How will success be measured?

**Resources/access required:**

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



**Deadlines:**

When must the job be finished? Or if an ongoing duty, when are the review dates? When are the reports due? If the task is complex or multi-faceted, what are the priorities and at what milestones will you check in?

**Communicate:**

Who else needs to know about this reassignment?

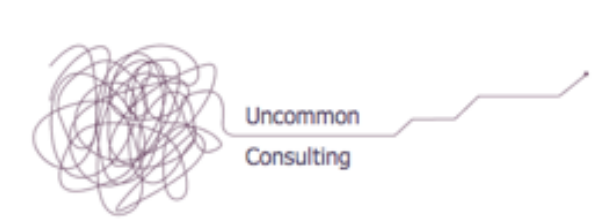
NOTE: Involve the delegatee in considering this so they can see beyond the assignment at hand. Do not leave the person to inform their or your own peers of their new responsibility. Anticipate matters of politics or protocol. Inform your own boss if the task is important or high visibility.

**Feedback on results:**

When will you let the person know how they are doing, and to what extent they have achieved the success metrics.

**Good leadership:**

Publicly take responsibility for any failure but pass on the credit for success.



## Levels of Delegation – Examples

### **1 "Wait to be told." or "Follow these instructions precisely."**

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

### **2 "Look into this and tell me the situation."**

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, tell me the situation and your recommendation. I'll/We'll decide."**

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

### **4 "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.

### **5 "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 as the default is now positive rather than negative.

### **6 "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.

### **7 "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 at a later time. Feedback and review remain helpful and important, although the relationship is more likely one of mentoring, rather than coaching.

### **8 "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.