



Mastering the Art of Delegation

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The Delegation Experience - Intentional Path to Collaboration



We believe we could draw a picture with any Corporate Athlete capability in the center and all of the others could be linked around the center image. This is because these skills are linked and reinforce each other to extend a leader's capabilities. They are all pieces of the puzzle of creating career success.

The purpose of "The Delegation Experience" is to prepare leaders to increasingly deal with higher levels of complexity and ambiguity in situations where you have to get results from People and components not under your control.

A leader's role can be both management of the people and/or management of the initiatives needed to achieve the leader's vision.

A leader is someone who takes ownership and is accountable to make the vision happen; like get a team or organization to a new level of performance.

"Managing" is often defined as getting things done through people. Delegation is giving those people things to do.

The Team Site has articles, videos and workbooks with a variety of perspectives. Many of these are written or rooted in a past view of a traditional corporate structure of managers and employees who worked in silos to get things done. As you know, increasingly, there are fewer "people" managers and more high-level positions where leaders have no direct reports ... they must get things done across a matrix of people and across silos of components. The good news is you don't need to have a people manager title to be an important leader in the organization.

Whenever you hear or see the word "employee" ... we want you to think "Team member".

When you are a leader you get things done through Team members.

You will also see references to a big benefit of delegation which is that you can, and should, focus yourself on what it is you do that is your best work and uses your best talents. This is the only way to stay highly productive and thrive in your career. We call this your Exceptional Talent zone.

To stay in your Exceptional Talent zone and be the leader you're capable of being ... you will need to acquire the capability to lead big initiatives by delegating to team members across a matrix that may be peers or even higher-level folks who you need for your success.

Delegation is essentially asking for help. Most people, when asked, respond positively to a request for help if you approach them in a way that is consistent with their driving forces and behavioral style. How would you like to be asked?

Our goal is to help you develop the skills to be an exceptional leader, delegator and Team member ... so that you can perform all three roles with alacrity.



Alone we can do so little; together we can do so much.

- Helen Keller

Succeeding in business has always been tough. These days, it's downright brutal. What do you need most? Time. What do you need even more? All the help you can get!

Effective delegation is key to business success and having a life

Some successful leaders work 80 hours a week and some 50. None can realistically look back and say they had to work long hours because there was no one available for delegation. Isn't your number-one job to put a team in place?

Even the most successful senior leaders would say they could do a better job at delegation. In his book *The Five Temptations of a CEO*, Patrick Lencioni highlights the failure to clearly delegate and to hold people accountable as two of the major issues for a CEO.

When we look at Exceptional Talent profiles, we see a recurring theme around the need for more effective delegation. In fact, 75% of our clients indicated not only that delegation was something they didn't do well, but also they disliked doing it.

Related to delegation, more than half of them indicated the same was true for "Explicitly setting goals, expectations and limits" and for "Monitoring, rewarding and confronting performance".

What seems to be the problem?

We have heard about delegation. We have read about delegation. We have thought about delegation. But how many of us know a leader who has *studied* delegation and set about to practice what s/he learned? Not many. Even those who teach leadership and management skills professionally encounter few serious conversations on the subject. The concept of delegation as a vital tool for the effective leader seems to be rarely grasped.

This workbook, then, is focused on how a leader can greatly reduce their stress and increase their effectiveness by better practices around *delegation*.

Managing vs. delegation

Managing is generally defined as getting things done through people. Delegation essentially is giving people things to do. Thus, by definition, the two are inextricably interwoven.

Leaders get the best leverage for their efforts and produce the best value for their organizations when they are directing their energies to those top-level duties like developing policies, setting strategy and direction, and measuring results. In order to focus on these areas, delegation must be a key approach.

The inability or unwillingness to delegate has frequently led to the downfall of many leaders—from presidents to Project Leaders who don't delegate usually work hard but achieve less than their potential. They measure success by effort expended and hours spent—working hard but not smart. Leaders who delegate measure their success by the results they produce.

This module is designed to help you to identify what effective delegation looks like, your compelling reasons to delegate, what and to whom you should delegate, and finally to provide you with an "anatomy of delegation" tool and a systematic approach to apply it.

This is not to say this is easy. To be an effective delegator requires you to set aside time to focus on delegation. You **must** stop managing activities and start managing **outcomes**. Delegation must become a habit with which you become delighted and addicted.

When you completed the **Delegation Self-Assessment** you were able to get in touch with how effectively you delegate. Keep in mind your delegation challenges and successes as you continue through this book.

Benefits and Barriers to Delegation

As a key activity of the leader, delegation has benefits both direct and derived. Four of the most significant are that delegation:

1. Extends results from what you can *do* to what you can *monitor*
2. Frees your time for more important work
3. Develops subordinates' initiative, skill, self-sufficiency, knowledge and competence
4. Allows you to focus on that which only you can do ... your Exceptional Talents.

Delegation is one of those activities that is rarely, if ever, taught to the rising leader. It's a skill that everyone assumes anyone can do. But if you've ever delegated a task or project that was less than sterling in its results you may have felt that the delegation process was too much time and trouble for what you got back. But effective delegation is the strongest productivity improvement tool a leader can utilize.

The following chart describes both the benefits and the barriers from the perspective of the team member, the leader and the organization.



Benefits	Barriers
<p>To Team Members:</p> <ul style="list-style-type: none"> • New skills and development • New responsibility • Enhanced self-esteem, personal satisfaction • Larger perspective • More interesting and diverse work 	<p>Imposed by Team Members:</p> <ul style="list-style-type: none"> • Fear of making mistakes • Lack of competence • Seen as work overload • Avoidance of responsibility • Lack of experience
<p>To Leaders:</p> <ul style="list-style-type: none"> • Total job gets done • Subordinates' potential assessed • Increased competence of team members • More priorities are concentrated on • Increased motivation of team members • Exceptional talents are focused on for all 	<p>Imposed by Leaders:</p> <ul style="list-style-type: none"> • "I can do it better/faster myself" • Reluctance to give up "hands-on" work • Lack of confidence in team members • Perfectionism and over-control • Lack of experience with delegating • Perceived lack of time to monitor
<p>To the Organization:</p> <ul style="list-style-type: none"> • More gets accomplished • Skills and knowledge are distributed • More time for priorities • Utilization of everyone's exceptional talents • Increased job satisfaction 	<p>Imposed by the Organizational Culture:</p> <ul style="list-style-type: none"> • Lack of tolerance for mistakes • Time pressures interfere • Lack of trained personnel • Emphasis on management accountability • Unclear or rigid responsibilities • Constantly changing priorities

What would be the benefits to you personally of increased delegation skills?

What would be the benefits to your organization if the entire leadership team had better delegation skills?

What are the most common barriers to delegation in your organization imposed by team members, the organization and you?

Team Members	Organization	You

Recall a situation in the past where, in hindsight, a delegation did not go well. Use the following format to summon up the experience.

Things did not work out as you expected or desired.

<i>The job or task you delegated.</i>
<i>The person to whom you delegated.</i>
<i>The reason you delegated the particular assignment.</i>
<i>The outcomes you expected.</i>
<i>The actual outcomes.</i>

Now, think of a situation where a delegation went extremely well. Use the same format again to recall the experience.

Things worked out superbly. Better than you expected.

<i>The job or task you delegated.</i>
<i>The person to whom you delegated.</i>
<i>The reason you delegated the particular assignment.</i>
<i>The outcomes you expected.</i>
<i>The actual outcomes.</i>

As you read through this booklet, continue to reflect on both the negative and positive experiences and try to determine what went wrong and right, and what more you could have done to affect a more positive outcome.

Surround yourself with the best people you can find, delegate authority, and don't interfere.

- Ronald Reagan

As the quotation above suggests, delegation is primarily about entrusting your authority to others. This means that they can act and initiate independently, and that they assume responsibility *with* you for certain tasks. If something goes wrong, you remain responsible since you are the leader; the trick is to delegate in such a way that things get done but do not go (badly) wrong.

What You Should Know Before Getting Started

To understand delegation, you really must think about people. Delegation cannot be viewed as an abstract technique; it depends upon individuals and individual needs.

Team Member Performance Levels

As a person learns a job, they can move through three levels related to performance:

- Novice
- Growth
- Mastery

At the Novice level, performance is minimal. Competence initially comes from others who are directing the person in some way—in person, through written instructions, etc. During this stage, competence grows as the person absorbs and practices the skills and knowledge needed to perform the job.

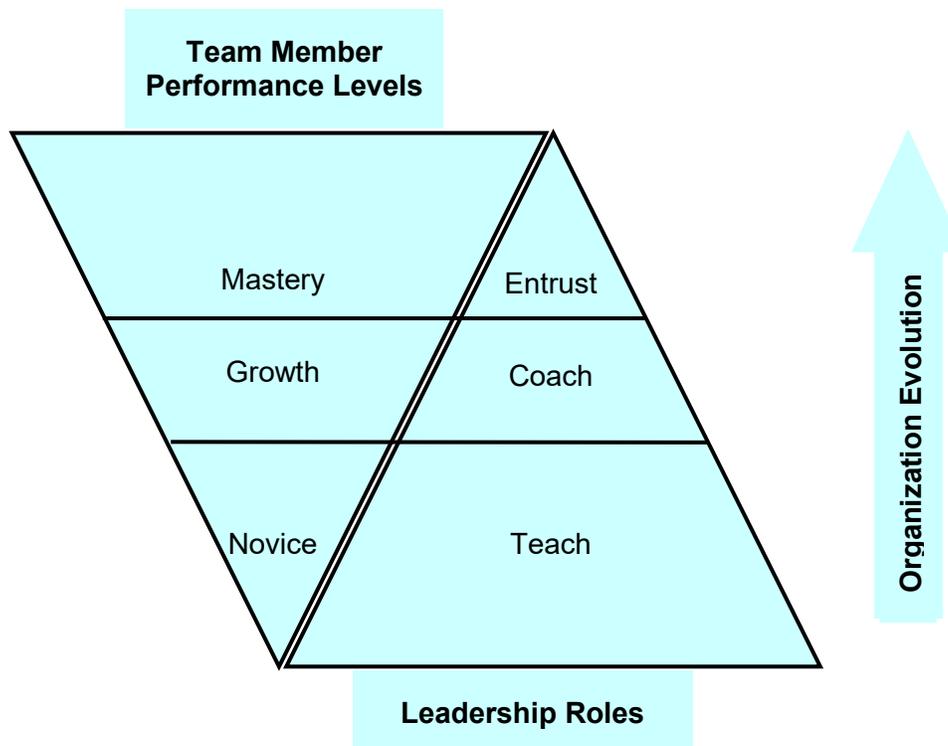
At the second level, the Growth level, performance rounds out and improves as competence grows through a combination of practice and experience. At this level, the person has the basic skills and knowledge, but is still working on effectiveness in applying them appropriately.

The top and final level is the Mastery level, where the person has mastered the job. They possess all the skills and knowledge to do the job and have the confidence to do it on their own. Others can see mastery in an individual; the individual may coach others on this type of work or activity.

Mastery, however, is a deceptive term. The days of striving to be a "master of your trade" are long gone. Information and technology are changing too rapidly. Competence must continue to grow even at this level.

Every new assignment can cause a brief recycling through the three levels.

The value of this model is that it allows you to assess where individuals are and to apply the appropriate leadership strategy that they need at that particular level.



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

- George S. Patton (1885-1945)
American Military Leader

Leadership Roles

There are three corresponding levels of leadership support required. At each level, you provide the employee with what is needed for them to function effectively.

With a Novice level, you are in a Teaching track. Your role is the most involved at this level. Here you are providing the novice team member with almost all the support needed for performance. This includes:

- Job competencies—specific skills and knowledge necessary to do the job.
- Organizational know-how—the specific knowledge of how things are done in your organization.
- Resources needed to do the job, e.g., people, tools, supplies and equipment.
- Self-management skills, e.g., how the person must set priorities or manage time.

The second leadership level is the Coaching track. Your role is to provide the team member with practice and experience. Your role is shaping performance through feedback and building confidence through providing support and motivators.

The third and highest leadership level is Entrusting. At this leadership level, the person is at the Mastery stage and can function independently of the leader. Here your role is to provide them with the authority and responsibility to do the job as well as motivators to continue functioning at the Mastery level. Here, the leader functions as a resource.

What Does This Mean to You?

Depending on the culture of your organization, the impact of this model on your ability to delegate effectively is significant.

Let's use an example to illustrate.

Example

You want to have an effective management system created and implemented. You believe the person to be responsible for this activity is Bob. Bob is your COO and you believe he's at a Mastery level. You describe to Bob what it is you have in mind and when you want it done. Now, depending on your culture, Bob will react in one of three ways.

Way Number 1: Bob says no problem he has done this before. He describes generally what he will do and either agrees with the deadline or negotiates an extension. You are happy; you have complete confidence in Bob.

Way Number 2: Bob reminds you that he has an extremely full plate and suggests that the best way to handle this is to give it to Sam. Sam works for Bob and has never implemented a management system. Bob assures you that Sam has the time to devote to getting the management system implemented by the deadline. He then says he'll get Sam to come see you to get the details. This means you are going to take on the role of either Teacher or Coach, depending on Sam's level of knowledge, skill and experience.

Way Number 3: Bob delegates the assignment to Sam and he takes on the role of Teacher or Coach. This means more work for Bob, so he may miss the deadline or it may affect his ability to get the other items completed on time.

What this means is that you need to be very aware of the personal impact if you must move down in role from Entruster to Coach or Teacher.

Clearly, the least productive leader role is "Teacher"... but how can you increase your whole organization's delegation capabilities so you can stay at a higher level?

What ideas for action come to mind for you?



Deciding What to Delegate

The first step in delegating is to identify what work can and should be delegated.

In general, work to be delegated should adhere to the following guidelines:

1. *Your old job (if you have been growing within a function)*

Though you were good (even great) at your old job and had fun doing it, it's time to let go. This is important if you want to take on more responsibility.

2. *Things you are not good at ... or don't want to do*

You're in a position to delegate to others those tasks on which you would rather not work. These activities are often found in the bottom and right quadrants of your Exceptional Talent profile.

3. *Things you don't have time to do*

You aren't doing your organization, team members or subordinates any favors by over-committing yourself. You need to save open time slots for emergencies, coaching time and just plain thinking.

Honestly assess yourself—are you over 50% operational? If so, you won't provide long-term leadership to your organization.

4. *Things someone else could do better*

Sometimes we hold on to a task, even though someone else could do it faster or better. This need for control usually works against us, though, because we don't end up with the best output possible. Turning over responsibility to others is not admitting a deficiency. On the contrary, it shows great insight when we identify and utilize our strongest talents.

5. *Things you enjoy or do very well, but that don't make the best use of your talents*

Resist the temptation to hang on to these tasks. Remember, you may be doing the task *correctly*, but are you working on the task for which you are most qualified?

6. *Things someone else needs to do in order to grow professionally*

Granted, you can often perform a task better or faster than another team member. But for a person to progress professionally, they may eventually need to perform this task. Recognize that although *you've* always done a specific task (and done a fine job of it), investing the time to teach others will be worth it in the long run.

7. *Personal activities that you think you should do yourself*

We all have a big list of things we need to do for our families or to address personal life balance issues. In most cases these will be the least effective leverage places for you to spend your talents. You should have an external team to support you — people you can trust as much as your staff at work.

What Not to Delegate

In most cases, the following activities should not be delegated to others because they require the expertise of experienced leaders:

- Activities with poorly defined objectives.
- Leader functions such as team building, budget approval or personal development.
- Decision-making involving objectives of the organization or department.
- Decision-making involving interdepartmental or organization-wide relationships.
- Tasks that deal with confidential information.
- Performance evaluations.
- Resolution of disputes.
- Personnel matters.
- Disciplining, praising or thanking others.
- A crisis.

Trust People

If you do not trust one or more team members, take time to consider why. Are they not trustworthy? Are they incapable of handling work that you would like to delegate? Then ask yourself if your own actions may be the root cause for your lack of trust: have you provided adequate feedback (positive/negative) about job performance? Have you delegated authority as well as responsibility? Do you provide support and build confidence in others? Do you encourage people to come to you with questions?



Summary

If delegation is not one of your exceptional talents, you may want to avoid improving this vital skill. Unfortunately, unlike most of the activities in the Exceptional Talent profile, you can't delegate delegating ... and even if you could, how effective would you be?

We believe that by more clearly understanding which behaviors and barriers are inhibiting your effectiveness in this area, you will be better able to put new habits into play and, over time, become a more successful delegator.

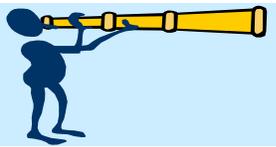
As with any other skill, knowing how is the first step, but practice is the key to improvement. You will need a definitive action plan related to delegation. With a specific project or assignment in mind, look at the Seven Steps to Effective Delegation on the next page and complete the worksheet on page 10.

I'm not sure what I want, but I'll know it when I see it!

Unknown

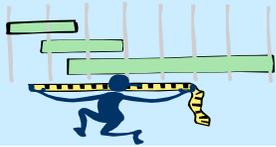
So, How Should You Delegate?

The 7 Steps to Effective Delegation

Step	Action	Description
1	Select the task 	<ul style="list-style-type: none"> Fit the task to the person. Make it challenging but doable. Try to delegate the whole task to provide enrichment and avoid confusion.
2	Select the person 	<ul style="list-style-type: none"> Fit the person to the task. Ensure they can handle it. What performance level are they at? Be prepared and able to take on the appropriate leadership role. Explain why you selected them. If it's a developmental task, tell them.
3	Outline the task 	<ul style="list-style-type: none"> Define the outputs. What is success? Check for understanding. Ask for input. Confirm acceptance of the task. Gain commitment—most important point! <p><u>Note:</u> Checking for understanding helps to fix accountability. It eliminates the excuse, "I couldn't do it because I didn't understand what you wanted."</p>
4	Clarify the task 	<ul style="list-style-type: none"> Provide guidance, suggestions and options. Set deadlines—interim and final. Arrange for resources. Define the person's range of authority.
5	Set 'em free 	<ul style="list-style-type: none"> Set the person free to do the job. Be patient if they encounter problems. Although it's easier to provide solutions, it's better to help the person find one—ask questions.
6	Maintain control 	<ul style="list-style-type: none"> Watch from a distance. Don't meddle. Share information. Ask questions ... avoid reverse delegation. Check periodically ... set specific dates.
7	Evaluate results 	<ul style="list-style-type: none"> How well results met standards. Areas needing improvement. Things done well. Lessons learned. Recognition for a job well done.

You are free to copy this page to use as a template for all the assignments/projects you delegate.

The Delegation Worksheet

Step	Action	Description	Your Assignment/Project
1	Select the task 	<ul style="list-style-type: none"> Fit the task to the person. Make it challenging but doable. Try to delegate the whole task to provide enrichment and avoid confusion. 	
2	Select the person 	<ul style="list-style-type: none"> Fit the person to the task. Ensure they can handle it. What performance level are they at? Be prepared and able to take on the appropriate leadership role. Explain why you selected them. If it's a developmental task, tell them. 	
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7	Evaluate results 	<ul style="list-style-type: none"> How well results met standards. Areas needing improvement. Things done well. Lessons learned. Recognition for a job well done. 	

We have exposed you to a lot of ideas and material in this workbook. The real key to improving your delegation ability is to turn these ideas into actions.

Look back at page 4 where you documented your two delegation scenarios—one that went well, one not so well. In light of what you have read in this workbook:

1. What went wrong?
2. What went right?
3. What more could you have done to effect a more positive outcome?
4. What will you do the next time?

Delegation went well:

Delegation didn't go well:

Now, consider the following actions:

1. At a leader or project meeting, provide the Delegation Trap Assessment for each person at the meeting. Have them assess themselves and then discuss what you could do as a team to be more effective delegators and receivers of delegation. Realize in the morning you may be the delegator and in the afternoon the team member helping someone else on their project.
2. Get your manager to give you feedback on how people perceive you in the delegation role.

Are you working *on* your business or *in* your business?

Delegation is the key activity that can most positively influence your business and personal success. Though not easy to master, even reasonable progress can:

1. Increase the probability of business successes.
2. Allow you to stay focused on strategic activity versus operational.
3. Give you more time to focus on your exceptional activities.
4. Ensure you have a support structure that enables you to use your exceptional talents.
5. Actually grow the talents and strengths of your team.
6. Increase your personal productivity.

Take a moment to summarize your thinking. What actions might you take in the next 30 days?

ACTION	WITH	BY WHEN