

Six Steps to Effective Delegation

By Donna Genett

Delegation is more than just a way of getting people to do things for you. It is also a powerful leadership and coaching tool.

When used properly, delegation enables you to increase productivity and profitability, improve morale and increase retention. Perhaps most important for overworked and overstressed CEOs and executives, it allows you to enjoy professional success and still have a personal life.

Achieving these results requires *effective* delegation, which involves six basic steps:

1. Prepare in advance.

When it comes to delegation, the Nike approach (just do it) does *not* work. The more you prepare, the better your results.

Before delegating, take the time to think through the task and identify whom you will delegate to and the outcome you want. In addition, identify a goal and purpose for the delegation. For example, using delegation as a coaching tool is very different from trying to get a pile of work off your desk. Your goal will determine the approach you take.

2. Discuss the task to be delegated.

Engage the employee in a specific conversation about the task you want to delegate, then have them repeat back to you (in their own words) what they heard. Make sure both of you are in agreement regarding the task being delegated and the outcome you desire.

When preparing for this step, ask yourself questions like:

- What needs to be done in a particular way?
- Where does the person have some creative freedom?
- What specific outcomes am I looking for?
- How likely is it that the person will succeed?

3. Identify the deadline for completion.

This seems obvious, but managers often fail to clearly think through this step. Make sure your deadline is realistic and achievable, particularly when delegating a stretch goal or something the person hasn't done before. If you think the employee might need some revision time, build it in up front so you don't end up at the deadline with a different outcome than the one you wanted.

When setting the deadline, take into account where the delegated task fits in with the person's existing job responsibilities. Ask yourself, what level of priority does this task have with other tasks that have already been delegated to the person? This is particularly important when cross-delegating between departments, where it is essential to establish priorities and make sure all managers are in alignment with those priorities.

Also, think about the person's chances of success. Is the employee likely to get the task done in the time frame you have set? If not, what modifications to the deadline are you prepared to make? If the deadline is inflexible, you may need to choose someone who has a lighter workload or someone you know will get the job done. Or, you may choose to split the task between two people. The key is to delegate according to the flexibility of your deadline.

4. Outline the level of authority.

Clearly outline the level of the authority you want the person to have. Then stand back and let them act. Different levels of authority include:

- **Recommend.** Ask the person for a recommendation on a course of action, but you make the final decision. Use this level when:
 - The risk associated with the task or project is high
 - The person has little experience in the area
 - You need options researched and a best course of action chosen
 - You want to provide the person with a learning experience
 - You want to gain buy-in
- **Inform and initiate.** The person will inform you before they take action. Use this level when:
 - The risk associated with the task or project is moderate enough to allow some freedom and flexibility but you have some concerns about giving full authority
 - The person has some experience in the area but you want to provide some coaching.
 - The person has succeeded at the "recommend" level and proven they are ready for the next level.

The "inform and initiate" level is also good for projects that need to be completed over time so you can check in on different phases, or when you want to broaden someone's level of responsibility.

- **Act.** The person has full authority to act on their own. Use this level when:
 - The risk associated with the task or project is very low
 - The employee has plenty of experience in the area
 - The person has succeeded at the "inform and initiate" level and proven they are ready for the next level

If your primary goal is to get the job done, choose someone who already fits into the "act" level. To engage in coaching and development, select people in the first two levels.

5. Build in checkpoints or progress reports.

At the beginning of the task or project, schedule a series of checkpoint meetings. Build them in early and close together at first, then taper off as the person begins to master the task. During the checkpoint meetings:

- Review the work that has been accomplished to date and give feedback on how well it is meeting the criteria established in step two.

- Identify anything you would like the person to do differently. Ask them to repeat back your requested modifications to ensure they understand.
- Ask the employee questions like: Are you encountering any problems? If so, what are you doing about them? Are you staying within your limits of authority? Are you on track to complete the task or project on time?
- Provide encouragement, coaching and feedback.
- Set the next checkpoint meeting (if you don't already have a preset schedule).

6. Conduct a final debriefing.

The final debriefing consists of a two-way discussion about how the delegated task went. It allows you to:

- Reinforce growth that has occurred
- Outline areas for additional growth
- Applaud success
- Document performance problems
- Provide real coaching

Debriefing involves a neutral inquiry. Ask the employee how they think they did on the task or project, provide feedback on how you think they did, and discuss any differences in your assessments. Next, have the person provide feedback on your performance as a delegator, give your own assessment, and discuss any differences. Offer the person suggestions for improvement and listen to any they might have for you.

As CEO, you should delegate about 95 percent of what comes across your desk, so that you focus on the strategic opportunities in front of the company. Using these steps will give you the tools and the confidence to delegate in a manner that achieves the results you want, while helping to grow your people and enabling you to become a more effective leader.

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