Delegation Questionnaire & Guidelines

	YES	NO
Do you frequently take work home?		
When you give your team member a task to do, do you tell them how to do it?		
Do you feel you manage your staff very closely?		
Do you spend more time doing tasks than managing?		
Do you have difficulty meeting deadlines?		
Do you feel that letting your team members take on more responsibility would be very risky?		
Are you able to ask for help when you are under pressure?		
Do you do things for others which they ought to be able to do themselves?		
When you have delegated a task do you assume that it will been done to the right standard (in other words there is no follow up)?		

If you answered 'YES' to the majority of these questions you need to start thinking about how you delegate.

Guidelines for Delegating Effectively

Getting the best out of those who work for you is essential for your success as a manager. There are three purposes in delegating:

- To develop and grow the capabilities of those who work for you

- To extend your 'reach' and collective outcomes

- To free you to perform tasks and activities that are a better use of you

Delegation is a skill in which relatively few managers are trained. Most are left to 'pick it up as they go along'. Unfortunately, they often pick up bad habits at the same time, and it is often these habits which lead to later failures in delegation – which in turn may contribute to other problems.

The following 'Nine Key Steps' are meant as an aid to checking your own delegation style and its effectiveness.

The 'Nine Key Steps'

Step 1: Explaining the importance of the task

Pretty basic stuff, but – surprisingly something that is often not done well enough! So:

- Ensure that individuals know and understand the context of the task(s) they have been given

- Ensure they know whether activites are strategic or tactical, and the fit of these in the overall scheme

- If other functions / people are also likely to be briefed to work in the area, the individual should be told

Step 2: Explaining what is to be done

- Explain, clearly and precisely, what it is you need the individual to accomplish and relate this to the overall context

- It is always a good principle in delegation to leave the question of *how* things should be done to the individual

- Be aware that over-prescribing the methodology for tackling the tasks/issues will stifle creativity and discourage lateral thinking – quite apart from being demotivating in itself. Beware of over-prescription!

Step 3: Delegating responsibility for the results or outputs

- Always be clear as to where the delegation ends – what exactly is being delegated?

- If you are willing to let the individual be entirely responsible for the end results of outputs, and to be so without reference back, say so clearly

- Conversely, if you want the delegate to check with you before completion, be equally clear about that

- Competent delegation requires clarity about who is free to make judgements; and who has the final accountability – and for what!

- You must also be clear about the need to refer back to yourself – in what circumstances will this be required? Should it be routine? Or (better) only in exceptional circumstances? Ensure clarity!

Step 4: Assigning responsibility for the entire task or issue

When delegating, let go!

- Failure to let go will increase the pressures on you – thus reinforcing the (mistaken) belief on your part that it is quicker to do important things yourself, rather than taking the time to delegate. This will set up a downwards performance spiral from which it may be difficult to break free

- Avoid handing out work piecemeal, a portion at a time. It will waste your own time – which you can ill afford – and that of the individual. Delegate whole tasks

- Failure to delegate whole tasks will produce sub-optimal outcomes, because this failure prevents individuals from gaining a clear vision of the end result required. It stifles initiative, and will ensure they have little chance of finding better or quicker means to completion

- At all costs, think hard about how to avoid stifling inititiative and creativity

Step 5: Encouraging individuals to demonstrate initiative

You need to go further than just avoiding incidental or accidental stifling of initiaitve. So:

- Look out for positive opportunities to encourage initiative, and seize them

- Explain that you will be happy to welcome successful new ways of tackling tasks

- Deliberately leave as much as possible of the processes or methodology open

- Do not lock people into 'process straight-jackets' unnecessarily

Step 6: Agreeing the timescales and deadlines

- Be reasonable, be fair, and be honest

- Be crystal-clear about report back and completion dates, but do not dictate unreasonable deadlines

- Where there is an absolute imperative for a tight timescale, explain the reason, and the consequences for the organisation of failure. Seek help in finding ways through

- Depending on the length and complexity of the task, you will need to agree checkpoints or milestones against which you will review progress and resource allocation

- Whatever the duration of the task / project, ensure that you build in a mechanism for early warning if it 'goes off the rails'

- Seek confirmation that the individual accepts their deadlines as realistic. This does not mean accepting lax scheduling – but it does entail taking the time to agree a realistic completion date

Step 7: Checking the understanding (before the work begins)

Communication is a two-way process. It has two sides – sending messages and receiving messages – and for it to work well, both need to be checked by you until they tally.

- It is vital that the messages the individual receives are those you intended to send. Check it out

- Scope for misunderstanding is always larger than we think, and the more difficult or complex the brief, the greater the need to double-check it has been understood in full

- Too many misunderstandings, and outright failures of projects, result from an initial (misplaced) assumption that all was clear to those performing the tasks

- Remember, it's not just the words – it's the way they are said. Avoid contradictory body-language, cynicism and sloppy preparation on your part

Step 8: Staying off the field of play

Whatever the situation, as manager/coach you should endeavour to keep off the playing field while the game is in progress.

- Your individuals – the 'players' have to win or lose on their own if they are to develop their capabilities, and nothing is more demoralising than being given a task to perform and then to have it gradually taken back by the person who delegated it

- If you believe that there is a significant chance that your people will make a hash of it, do not delegate the task – but in that case think long and hard about why that is the case, and what you will do about it

- If you find that you simply have to intervene – to get 'onto the pitch' – consider how best to do so without damage. Is it really essential that you do so? How best to explain your intervention? How to ensure no loss of face or other damage to the delegates? How can you get back off the pitch quickly and gracefully? What will happen if you do not intervene directly, but gave a few behind the scenes briefings? Above all – do not intervene lightly. The first principle always must be: stay off the pitch!

Step 9: Seeking and giving feedback

This really does matter if good processes are to be sustained.

- Make a point of always giving constructive feedback at reviews and at the end of a task/project

- Have the courage to seek feedback from your team on how successful (or otherwise) your delegation has been – ask for constructive suggestions for improvement

- Listen carefully to feedback and think through what you should seek to change as a result of it

- If style or process changes are needed, think them through, consulting if necessary, and take time to explain them and the reasons for them fully

- Try to regard all delegation as part of a learning continuum for you and the individuals alike

- Above all – be prepared to listen, and listen well!

Some common failings

There are three fairly common reasons behind failures to delegate effectively. They are:

1. Lack of direction – unclear objectives, limits of authority, context or timescales

2. Lack of feedback – not following through on the processes

3. Failure to let go – not fully delegating whole tasks right through to completion

Even if delegation is not working, all is not lost. All three failings are addressable – once they are consciously perceived and are 'owned up to' by the delegator. Building an environment where delgation works well, and where the organisation reaps real benefits, takes a significant time.