Mastering Delegation

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■ Executive Summary

A manager's primary job is delegating work and decision-making to others. It takes follow-up skills to ensure staff members are doing what they have been assigned. Effective managers know what responsibilities to delegate to allow themselves time to think strategically, to monitor and improve the performance of their employees, and to reflect.

Efficient delegation starts with the manager explaining what the expected outcomes are and why the tasks are vital to the stakeholders. He or she then assigns responsibility for the deliverables, along with authority to do what is needed to produce the desired results.

To excel at delegation, managers need much more than the ability to execute a suitable process. They need to have the following:

- ❑ A grasp of how their beliefs and behaviors impact their willingness to delegate
- ❑ An appreciation for the impact and value of delegation on an organization
- ❑ Trust in employees' motivation, ability, and commitment to do the job as well as the manager can
- ❑ The confidence to let go and stay on the sidelines as their employees do the work
- ❑ The ability to replace the enjoyment of doing the work by one's self with the satisfaction that comes from being an efficient, effective delegator
- ❑ The ability to overcome guilt associated with assigning challenging tasks to employees
- ❑ The proactivity to quickly delegate new tasks rather than procrastinate

For managers challenged with delegation, some reasons are legitimate. For example, if an organization consists of entirely new employees, it may be difficult for a manager to delegate complicated assignments. However, most such arguments do not stand up to rational analysis. Managers need to delegate because they can and should not do all the work themselves.

■ Discussion

A manager's critical responsibility is to delegate, which means getting work done through others. He or she does this by assigning authority and responsibility to a team or a direct report to carry out specific activities or make decisions. Effective managers maximize the efficiency and effectiveness of their team by expertly delegating tasks and decision-making authority.

Without well-developed delegation skills, managers will either fail or burn out. Furthermore, companies need their managers to delegate well to grow their talent, be competitive, and survive.

■ Let's explore the behavioral elements it takes to delegate:

❑ Performing only the work or making only the decisions he or she has the unique knowledge, expertise, and authority to handle. This means doing a minimal amount of work delivering the service or making the goods the organization is responsible for.

❑ Having an in-depth understanding of the staff's preparedness for assignments, their need for assistance, and where the work fits best.

❑ Coaching and instructing employees in how to accomplish increasingly complex and challenging tasks, so the capability of the team increases. Delegation is the gateway to on-the-job training, the most effective form of development.

❑ Agreeing up front to the critical aspects of the assignment, such as the deliverables, who will do the work, how it will be measured, and when progress will be reviewed.

❑ Pushing decisions down to the appropriate level in the organization, so the agility and responsiveness of the organization is improved. Moving decisions up the organization's hierarchy delays resolutions and wastes time.

❑ Using accountability and follow-up skills to ensure the delegated work gets done on time and to an acceptable quality standard.

Shockingly, process deficiencies account for only 10 to 20 percent of delegation challenges. Often, the root cause of delegation challenges lies with the manager's belief system and style. Therefore, to become an effective delegator, managers must first diagnose the root causes of their problems.

■ The following are the delegation challenges we see most often at Performex:

1. Autopilot behaviors, faulty beliefs, and habits

Name it, Claim it, and then Tame it.
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Our autopilot, underlying assumptions, and practices play vital roles in our ability and desire to assign tasks and decision-making authority. Autopilot is a collection of default behaviors, both good and bad, that people display without awareness and without a concerted effort to act appropriately. Our default behaviors kick in when we encounter stress, deal with urgent matters, and interact with challenging people. Some

people do not delegate because they have an autopilot that demands perfection. Others have an autopilot that causes them to avoid delegating because it takes enjoyable work away. Examine whether your autopilot plays a role in your delegation challenges.

Our beliefs, our convictions, and what we know about an individual or situation can get in the way of delegation. For instance, managers who are experts might not believe the work their team does is as good as their own. The consequence is the managers won't delegate the complicated and challenging work the employees need to develop their skills.

Habits can also prevent superior delegation. For instance, managers who procrastinate often realize they have waited too long to delegate; out of fairness, they end up doing the work themselves.

Once managers understand the root causes of our delegation challenges, they can often substitute a more appropriate behavior to make rapid progress.

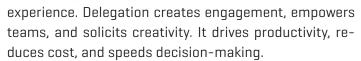To overcome procrastination, take the following steps:

❑ Concentrate on the positives of not procrastinating by making a list of all the good things that will accrue when you stop putting off delegation.
❑ Delegate the assignment or decision immediately, and get it out of the way. If you forget to assign a task, do it the moment you remember it.
❑ Begin with a relatively straightforward and simple request. For instance, ask the employee to create a draft plan of attack.
❑ Break the delegation process into separate steps, so each action is one in a series of small, achievable tasks. Then have the employee review the task with you, so you can improve and validate the plan.
❑ Provide positive recognition by rewarding yourself when you are proactive.

The Delegation Assessment allows participants to calculate how their behaviors, beliefs, and practices affect their ability to delegate. The report it generates contains helpful corrective actions and, where appropriate, positive reinforcement.

2. The impact and value of delegation on an organization

Managers often assume the most significant benefit derived from delegation is more free time or less work for them personally. However, delegation has many other benefits. It allows the manager to focus on the most important and strategic matters in their span of responsibility. It is an indispensable tool for building skills and behaviors of team members through learning via on-the-job experience. Delegation creates engagement, empowers teams, and solicits creativity. It drives productivity, reduces cost, and speeds decision-making.

Without well-developed delegation skills, many of a manager's key responsibilities cannot be met. To become a better delegator, a manager must dedicate time and effort to create an improvement plan and then execute it.

3. Poor delegation/prioritization skills

Some individuals suffer from a lack of knowledge regarding how to delegate and prioritize. Here is an overview of the highly effective Performex® Delegation Process:

a. **Plan** — Work diligently to define the what and why of the assignment. The what includes the expected results. The why is the business reason behind the request and its importance. From this information, create open-ended questions you'll use later to verify the employee's understanding of the assignment. Then next step is determining who will do the work and make the decisions. Factors include the urgency/importance of the work, who currently has the needed skill set; the development needs and workload of the employee; and finally, the ramifications of failure.

b. **Communicate and assign** — Once you have selected the employee(s) to delegate to, communicate the what and why to them. Clarify the expected results,

budget, decision-making authority, timing, and affected parties. Agree to a communication protocol for information to flow freely. Detail the content, frequency, updates, and most important, how and when to inform you of deviations to the plan or when a deliverable is in jeopardy.

c. **Confirm understanding and commitment** — Use the questions you developed in the planning stage to spur your employees to cover the parameters of the assignment in their own words. Then confirm that employees are committed to the expected results. Importantly, ask open-ended questions to draw out the ramifications or consequences (for the team, company, themselves, or others) that may result if they fail to deliver or exceed the desired outcomes.

d. **Review results and provide support** — The amount of follow-up and monitoring required is based on the importance of the request, the skill, and the forthrightness of the employee. Delegation isn't abdication, so you must periodically check in on individuals' progress. The best way to do this is to follow the agreed-upon procedures you established in the "communicate and assign" step.

e. **Close out the request/assignment** — Too often, projects and tasks don't get a formal close or hand off. Conduct a Plus (+)/Delta (•) discussion to examine what went well and what can be changed in the future to achieve better results. Add reviewing the prior Plus (+)/Delta (•) comments to the employees' next project plan.

The Delegation Workbook helps managers analyze the work within their area and determine who to delegate it to.

■ Best Practices

Save time by explaining the *what* and the *why*, and avoid telling *how* — We refer to this as delegating the how. Many managers, especially engineers, believe they must give complete and comprehensive instructions to their reports when they assign them work. In the future, allow your employee to outline their approach, and then you critique it. This method makes delegating easier for you as the manager and has the added benefit of fostering valuable thinking by employees. If you are not confident in the employees' skill levels, be sure to ask them for their best effort when creating their draft plan. Then sit down with the employees and review and improve the approach. Use open-ended questions to help employees develop insights into your thought process.

Discuss the consequences and ramifications for both success and failure — Many managers are uncomfortable with this discussion. Implications for both success and failure always exist. Therefore, it's a critical conversation and should not be conducted with a threatening tone. Use questions to help employees discover the consequences on their own. By getting the consequences out in the open, you'll see committed and accountable employees.

Become an expert at prioritization — Many managers find it challenging to get the critical, but not pressing, work done in their organization. Prioritization is the solution.

Thought leader Stephen Covey popularized the Eisenhower Decision Principle in his book, *The 7 Habits of Highly Effective People.* The methodology separates work into four cells in a matrix: not urgent, urgent, not important, and important.

Urgent tasks appear to require immediate attention. These are the to-dos that shout "Now!" Urgent tasks put us in a reactive mode, one marked by a defensive, negative, hurried, and narrowly focused mindset.

Important tasks contribute to our long-term mission, values, and goals. Sometimes important tasks are also urgent, but that is typically not the case. When we focus on important activities, we operate in a response mode, which enables us to remain calm, rational, and open to new opportunities.

The nonurgent but unimportant items should often be dropped. The urgent but unimportant items should be delegated or perhaps dropped. The urgent and important

items should and usually do get maximum attention. The important but not urgent items require thoughtful delegation. Many organizations never get the important but not urgent items completed.

Most people, especially those with a high get it done attitude, have a fixation with completing all the urgent work. However, as the complexity and size of their organization grows, the urgent matters can encroach on the time spent on the critical but not urgent matters. Use delegation to offset this tendency.

The Delegation Workbook has an urgent and important matrix to help managers use the Eisenhower Decision Principle.

4. Institutional expectation/culture

While uncommon, some companies, regions, and functions operate in a manner in which the manager is expected to know everything that is going on in his or her area of responsibility. Managers in these organizations also tend to severely limit the decision-making ability of subordinates to low-dollar and low-impact items.

We understand that some company cultures may inhibit delegation, but almost all companies value delegation at least on the surface and in their stated values. Therefore, it is tough for virtually any organization to resist any attempt to delegate if it's appropriately positioned within the leadership team.

A highly effective strategy in these instances is to ask yourself the following questions:

❑ Can you articulate a plan that keeps you sufficiently apprised of the prominent important status and issues your manager is facing with an assignment?
❑ Do you desire to be on top of everything to impress your boss and other key senior leaders by always having the answer? If so, how can you quell that desire?
❑ When did you last push the envelope to the limit? Then ask the manager to test if the organization cares that although you may not immediately know the answer, you can rapidly find it.

A strategy that works with tightly managed companies:

Inform your organization that you have delegated a vital assignment to _____ for development. Ask for help from the affected parties and senior managers. Let them know the designated employee will be the best source for information on the status of the assignment. Invite the delegate to accompany you during review meetings to present updates and answer questions from senior leadership or the steering committee.

5. Staff competence

A fair number of managers acknowledge that their lack of confidence in the abilities of their direct reports prevents them from delegating.

Failure to delegate the challenging and demanding work and decisions will cause a staff to be under-developed. A vicious circle occurs; the team lacks the assignments they need to improve, so they remain risky to delegate to.

If you consider your staff deficient, let's find some ways you can remedy the situation.

Mangers who thoroughly understand their staff's abilities and limitations can better delegate for efficiency and development. An excellent way to pinpoint what's holding people back from tackling more challenging work is to perform a skill (capability), will (motivation), and hill (barriers stemming from the work environment) analysis.

Skill is the capability to execute a task, project, or role to the expected outcomes. Although the capacity is labeled "skill," the category consists of both complex skills and behaviors.

Skills are derived from technical knowledge, coupled with the experience necessary to carry out complex activities or job functions. Skills are often process-based and involve tools and their application. Behaviors are synonymous with conduct and how a person acts and responds to changing business situations. Behavior is the ultimate objective we expect when delegating work or decisions to people.

When assessing whether to delegate a task or project, keep in mind building skills is considerably easier than changing innate behaviors.

The following are approaches you can use to assess your employees' skill levels:

❑ Key Performance Indicators — metrics to determine how well the employee contributes to the success of the business.
❑ Assessments — quizzes, 360 multi-rater assessments and behavioral assessments
❑ Observation — observations of both verbal and nonverbal cues to detect behaviors such as interpersonal skills or executive presence

❑ Metacognitive skills analysis — Do employees know when and how to use strategies for getting things done? Have they demonstrated the problem-solving skills necessary for success? Do they employ a process for accomplishing tasks: goal setting, planning, monitoring results, evaluation, and correcting?

Will is the drive and perseverance to execute tasks, projects, or roles to the expected outcomes.

Motivation comes from within each person; therefore, *will* issues are not easy to overcome. But as a manager, you can influence employees through recognizing, rewarding, coaching, and ensuring they understand the ramifications of exceptional and poor results.

Hill refers to the external obstacles employees will have to overcome to execute their roles. *Hill* issues stem from a lack of information, poor business processes, insufficient data, or unclear expectations.

Knowing whether the issue is skill, will, or hill will give you a good idea of what's holding employees back.

6. Asymmetrical delegating

Asymmetrical delegating is either delegating tasks but not decisions or only delegating low impact, unchallenging, or low-risk assignments.

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Some managers will cite the number of tasks they assign as proof of their superior delegating ability. Upon closer examination, you'll often find the work is mundane and not important. Keep in mind that advanced delegators effectively delegate complex assignments and decisions.

To make the shift to more productive delegation, review all your area's responsibilities and significant projects. For exercise purposes only, assign all the tasks to the ideal individuals even if they currently lack the skill or will or they face a large hill. Then detail the missing knowledge, skills, and behaviors for each instance. Incorporate the analysis into your coaching and development plans.

■ Discussion

As we've discussed, delegation is a vital leadership ability, and it builds skills, conserves resources, and motivates people. Managers who are stuck in a vicious cycle in which they can't delegate because their employees lack skills further propagate the problem by not assigning the types of work that build expertise.

What's needed is a breakthrough strategy that incorporates self-awareness, an excellent delegation process to follow, and continued effort toward a permanent behavior change on the part of the manager.

■ Key Readings

Amy Gallo, "Why Aren't You Delegating?" Harvard Business Review, July 26, 2012, https://hbr.org/2012/07/why-arent-you-delegating

Michelle Randall, "6 Steps for More Effective Delegation," Fast Company, March 6, 2013, http://www.fastcompany.com/3006643/6-steps-more-effective-delegation

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Brett and Kate McKay, "The Eisenhower Decision Matrix: How to Distinguish Between Urgent and Important Tasks and Make Real Progress in Your Life," artofmanliness.com, October 23, 2013 (updated: April 21, 2020), https://www.artofmanliness.com/articles/eisenhower-decision-matrix/

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