

Delegating for Results

A **KAW Consulting**
Manager's Toolkit Title

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ABOUT THIS BOOK

Successful delegation is one of the most critical skill sets a Supervisor or Manager needs to develop. Being able to delegate successfully helps you tap into the potential of your staff. It helps you accomplish much more than you could working alone, and allows you to devote your time and efforts to your most critical tasks, or things you do best. Put simply, being able to delegate successfully is one of the keys to a successful career in Supervision or Management.

The purpose of this handbook is to help you learn how to delegate successfully. You'll learn how to:

- Identify what tasks to delegate
- Identify the right people to delegate to
- Identify the level of delegation that you're comfortable with
- Determine what the person doing the task needs to be able to deliver the results you expect.
- Hold effective delegation meetings.
- Conduct the needed follow-up to stay on top of the person's progress.

ELECTRONIC FEATURES

This book contains a number of handy to use electronic features. The Table of Contents contains hyperlinks that allow you to jump directly to the page you're interested in.

You also have control over your printing. You can print out the entire book, a range of pages, or a single page as needed by using the "Print" option for your PDF reader.

You can also store **Delegating for Results** in a folder on your PC, and access it whenever you want. This makes it easy to use over and over again as an important reference and tool when planning and delegating assignments to your staff.

SECTION 1

THE BASICS

WHY DELEGATE?

Delegation is the process of transferring responsibility for performing tasks and accomplishing results from you to someone you trust. Here are some of the benefits of doing so.

- Projects you're responsible for involve too much for you to do alone.
- You can accomplish more
- You can concentrate your efforts on your most critical tasks and things you do best.
- It helps develop the capabilities of your staff.

SIGNS YOU'RE NOT DELEGATING ENOUGH

If you're not delegating sufficiently and involving your staff in the work, there are often some symptoms. Here are some of the more common. If they apply, developing your delegation skills may be helpful.

- You're doing too much of the work yourself
- You feel that you need to do all the work on critical tasks yourself because none of your staff can.
- You feel terribly overworked
- You're not spending your time on things you feel you do best.
- Your in box is always jammed.

WHAT KINDS OF TASKS CAN I DELEGATE?

There are many kinds of tasks that make excellent candidates to delegate. Here are some of the more common types:

- Routine and minor decisions
- Information Gathering
- Technical tasks
- Operating tasks
- Report generation
- Tasks you dislike doing that somebody else could do as well as you
- Tasks that can help your staff increase their capabilities and skills
- Other categories that you can think of

WHY PEOPLE RESIST DELEGATING

People often resist delegating for a variety of reasons. Here are a few of the more common and strategies for overcoming them.

Common Reasons for Not Delegating

- Fear of loss of control
- Don't feel that staff has ability to do the work
- Tried to delegate before but it didn't work out
- Staff resists idea of taking on more work

Solutions

See Page

- | | |
|--|--------|
| ● Make sure you include all the key ingredients for success | 9 |
| ● Delegate at level you're comfortable with | 13 |
| ● Delegate a small portion of task initially, and build skills gradually | 12, 13 |
| ● Use strategies for overcoming staff reluctance | 14 |

SUCCESSFUL DELEGATION – KEY TRAITS

Successful delegations have some key traits. Here are some of the most common.

- The Supervisor and employee agree on:
 - What's being delegated
 - What's to be accomplished and the expected results
 - Operating guidelines and principles to be used when doing the task.
 - How performance is going to be measured
- The employee has the expertise to do the task.
- The employee has the needed authority and resources to accomplish the task.
- The Supervisor receives the critical information to stay informed on the employee's progress.

THE DELEGATION PROCESS

Successful delegation involves a 3 stage process—planning, making the delegation, and follow-up. Here are the critical ingredients in each phase.

- Phase 1: Planning
 - Focuses on 4 key questions:
 - ✓ What Tasks can I delegate?
 - ✓ What Level of Responsibility should I delegate?
 - ✓ Who can I delegate the task to?
 - ✓ What does the person need to accomplish the task?
- Phase 2: Making the Delegation
 - Describe what you want done
 - Communicate your expectations
 - Agree on a follow-up plan.
- Phase 3: Follow-up
 - Conduct needed status reviews so you know where things stand.
 - Determine and agree on corrective actions, if needed.

SECTION 2

DELEGATION PLANNING

DELEGATION PLANNING – STEP 1

The first step in delegating is to identify potential tasks to delegate. Here's an easy to use process. An example is shown on page 15.

- Look at how you are spending your time and identify your major tasks.
- Break each major task into its components.
- For each task component, ask:
 - Do I have to do it?
 - Even if I have to do it, can someone else help?
 - If someone can help, what part can they do?
 - Who would be a natural candidate to help with it?

STEP 2: DELEGATION LEVELS

You can delegate at different levels of responsibility. Here are some examples.

- Research/Information Gathering
 - Get specified information and report it in a specified format.
- Analyze a situation and report on what needs to be done.
 - Examples:
 - ✓ Problems
 - ✓ Questions
- Develop an Action Plan but don't implement until I approve it.
- Handle the task completely and report on results.

STEP 3: WHO CAN I DELEGATE TO?

For a delegation to be successful, it's vital that you delegate to the right person. Here are some key things to consider.

- What expertise is needed to do the task?
- Who has it?
- Who with the required expertise is available?
 - How much time is needed?
 - Does the person have the time?
 - What is the impact on that person's priorities?
- Is the person willing to help?
- If not, what can you do to help overcome their resistance?
 - Reassign some of their tasks to another staff member who can do them as well.
 - Adjust their priorities so needed time is available
 - Delegate smaller amount until person is more comfortable

DELEGATION PLANNING – EXAMPLE

Ann Johnson is a Supervisor in the Payroll Section of a mid-sized company. Looking through her Major Task list and completing steps 1-3, she found some good candidates for delegation. Here are two of them.

Task	Component	Do I have To Do It?	Who Else Could Help
Monthly Budget Reports	<ul style="list-style-type: none"> Gather Needed Information & Update Report Spreadsheet 	No	Tom - Mid level staff member.
	<ul style="list-style-type: none"> Draft Report Summary 	No	Tom
	<ul style="list-style-type: none"> Review Report Results and Summary 	Yes	
	<ul style="list-style-type: none"> Approve for Release 	Yes	
	<ul style="list-style-type: none"> Distribute Reports 	No	Ann - Admin. Assistant
Routine Questions from Other Departments	<ul style="list-style-type: none"> Understand Question & Needed Response 	Yes	
	<ul style="list-style-type: none"> Do Basic Research and develop recommended response 	No	Sue – Junior Staff Member
	<ul style="list-style-type: none"> Approve Response and give go-ahead. 	Yes	
	<ul style="list-style-type: none"> Call Departmental Contact and provide response 	No	Sue

STEP 4: WHAT DOES THE PERSON NEED?

To succeed, it's important that the person you're delegating to has what they need. Here are some things to consider.

- What resources do they need to do the task?
 - Examples:
 - ✓ Information
 - ✓ Procedure Write-ups
 - ✓ Additional Knowledge/Training
 - ✓ Equipment
 - ✓ Time
 - ✓ Access or cooperation from other people
 - ✓ Funding
- What authority needs to be delegated?
- Who needs to know of the delegation?

SECTION 3

Making the Delegation

DELEGATION MEETINGS

To delegate successfully, it's vital that the person you're delegating to understand what you're asking them to do. Here are some of the key components of a successful discussion.

- Task Description
 - What is the task's scope and purpose?
 - What are the desired results and key deliverables?
 - What are the due dates?
- Resource Requirements
- Needed training
- Guiding principles
 - What authority do they have?
 - Decision criteria
 - Principles to follow while performing the task
 - Things to Avoid Doing
- Feedback plan
 - How often do you want feedback on how things are progressing?
 - What format do you want it in?
- Communication of delegation to impacted parties

TASK DESCRIPTION TEMPLATE

Here's a sample format you can use to organize your thoughts and prepare a brief outline to give to employees.

Task Description and Expectations	
<ul style="list-style-type: none">● Person Responsible for Task:● Task:● Purpose:● Deliverables and Due Dates:	
Deliverable	Due Date
●	
●	
●	
<ul style="list-style-type: none">● Status Reporting Requirements:<ul style="list-style-type: none">- What to Report- Format- Frequency● Other Key Information/Operating Guidelines:	

TASK DESCRIPTION TEMPLATE – EXAMPLE

Here’s a sample task description template for one of the tasks from the example on page 15 that Ann decided to delegate to her staff—gathering the information and updating the Section’s monthly budget report.

Task Description and Expectations					
<ul style="list-style-type: none"> ● Person Responsible for Task: Tom ● Task: Gather information and generate Section’s monthly budget report, and draft report summary. ● Purpose: Needed to meet monthly budget reporting requirements. ● Deliverables and Due Dates: 					
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Deliverable</th> <th style="text-align: left;">Due Date</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> ● Get monthly cost data and enter into report spreadsheet template. ● Draft Report Summary </td> <td style="vertical-align: top;"> <p>2 days before report due date.</p> <p style="text-align: center;">" " "</p> </td> </tr> </tbody> </table>	Deliverable	Due Date	<ul style="list-style-type: none"> ● Get monthly cost data and enter into report spreadsheet template. ● Draft Report Summary 	<p>2 days before report due date.</p> <p style="text-align: center;">" " "</p>	
Deliverable	Due Date				
<ul style="list-style-type: none"> ● Get monthly cost data and enter into report spreadsheet template. ● Draft Report Summary 	<p>2 days before report due date.</p> <p style="text-align: center;">" " "</p>				
<ul style="list-style-type: none"> ● Status Reporting Requirements: <ul style="list-style-type: none"> - <i>What to Report:</i> <ul style="list-style-type: none"> ● Any problems or questions ● Completion of report and summary - <i>Format:</i> <ul style="list-style-type: none"> ● E-mail note or in person on any problems or questions. ● E-mail note to let me know that report and summary are ready for review - <i>Frequency:</i> <ul style="list-style-type: none"> ● As needed for problems or questions. ● Other Key Information/Operating Guidelines: <ul style="list-style-type: none"> - Remember to include explanation of major budget variances in the report summary. 					

SECTION 4

Follow-up

FOLLOW-UP: KEYS TO SUCCESS

The final key to successful delegation is conducting the needed follow-up. Here are some of the key things to keep in mind.

- Have enough review sessions to make sure you know what's going on.
- Use the format you agreed to when you delegated the task.
- Ask the needed questions to determine:
 - Status vs. deadlines
 - Will the deliverables be produced in the desired format?
 - Are there any problems being encountered? If so, is there any help needed by you to overcome them?

KEEPING TRACK OF WHAT YOU'VE DELEGATED

Here's a log to use to keep track of the tasks you've delegated.

Task Tracking Log			
Task:	Assigned To:	Due Date:	Status:
1.			
2.			
3.			
4.			
5.			

TASK TRACKING – EXAMPLE

Here's a sample log for the tasks used in the example on page 15 that Ann delegated to her staff.

Task Tracking Log			
Task:	Assigned To:	Due Date:	Status:
1. Update Monthly Budget Report	Tom	March 28	In process; Tom's e-mail status reported no problems. Meeting to review draft summary report scheduled for Friday.
2. Distribute Monthly Budget Report.	Ann	March 31	Ann checking distribution list of e-mail addresses for my review and approval.
3. Research Question from Department X.	Sue	This Afternoon	In process.
4.			

SECTION 5

Tools

POTENTIAL TASKS TO DELEGATE

How to Use this Form:

1. Look at your Major Task List and identify how you are spending your time. Enter each major task and it's components into the appropriate columns.
2. For each component:
 - Identify whether you have to do it.
 - If not, identify the best person to help.

Task:	Component:	Do I have To Do It?	Who Else Could Help?
	•		
	•		
	•		
	•		
	•		
	•		
	•		
	•		
	•		
	•		

TASK DESCRIPTION TEMPLATE

Use this form to provide the person that you're delegating a task to with the basic background information about the task.

- Person Responsible for Task:
- Task:
- Purpose:
- Deliverables and Due Dates:

Deliverable:	Due Date:
•	
•	
•	

- Status Reporting Requirements:
 - What to Report:
 - Format:
 - Frequency:
- Operating Guidelines/Other Key Information:

TASK TRACKING LOG

Use this form to keep track of the tasks you've delegated.

Task:	Assigned To:	Due Date:	Status:
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

CHECKLIST

Use this checklist to make sure you've covered all the bases when you delegate a task.

- You and the employee agree on what's being delegated.
- You and the employee agree on what's to be accomplished, the desired format, and due dates.
- The employee has the expertise to do the task.
- The employee understands the needed procedures.
- The employee has the needed resources to do the task, such as:
 - Equipment
 - Access to Information
 - Access to Other People
 - Funding
 - Time
- The employee has the appropriate authority level to do the task.
- You've communicated the task delegation to those who need to cooperate with the employee.
- The employee understands the operating guidelines.
- The employee understands when and how to report on status, problems and questions.
- You have a follow-up plan in place to stay on top of the employee's progress.

FINAL THOUGHTS

We hope you've enjoyed this book and learning how to delegate successfully. In addition to our electronic books, **KAW Consulting** also provides customized training and development in the following areas:

- Leadership
- Supervision
- Team Development
- Effective Management (delegation, coaching and counseling, etc.)
- Change Management
- Project and Time Management
- Effective Meetings
- Performance Management

If you would like information on other titles in the *Manager's Toolkit*, or information on **KAW Consulting's** customized training programs, please visit our website at www.kawconsulting.com or phone us at 302-479-7855.

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