

Learning to Delegate

Overview

Tips for managers on how to delegate

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The higher up you move in an organization, the more effectively you need to delegate. Successful delegation involves turning the right tasks over to the right people for the right reasons, with the resources and authority to act. It requires giving employees enough information, authority, and resources to get the job done the way it needs to be done. Delegation goes beyond just handing off the job. It includes setting performance expectations, following-up, and providing feedback. Below you'll find tips to help you learn to successfully delegate.

Why is delegation necessary?

There are several reasons to delegate:

- *Delegation allows you to devote energy to more important tasks.* You probably have a range of tasks and duties, some of which are more important or engaging than others. Managers often spend too much time on the action-oriented activities, such as dealing with sudden problems or issues, and not enough time working more strategically on process improvements and future planning. When you delegate some responsibilities, you will be able to focus your energy on those tasks.
- *Delegation gives employees necessary opportunities to grow in skill and experience.* This is important for the company's long-term success. Say, for example, that a top plant engineer was promoted to his boss's position. If he hadn't given any of his own employees opportunities to learn key parts of his job, it would take a long time for the company to replace him in his former role. Someone seeking to move into a managerial role may be eager to learn about the critical elements of budgeting or other departmental administrative duties. You might delegate those tasks to the employee, overseeing the final outcome, but not doing the work.
- *The ability to delegate is important for your own advancement.* As you move up in the organization, the managers above you watch to see not only *whether* you get the job done, but also *how* you get it done. They want to see what management skills you have, especially your ability to act strategically, with a focus on future planning and innovation. Delegating skills are essential for demonstrating that you can work at this higher level.
- *Some employees may be better at some jobs than you are.* It's no reflection on you: Different people simply possess different skills. And when you find the right employees for the work in question, everybody wins. Sometimes managers forget

that their employees' success is their success. Effective managers take pride in their employees' success and encourage their development whenever possible.

- *You are overworked, stressed out, or getting behind.* When you are behind, your employees may also be behind. They may depend on you for getting certain tasks done, and if you miss deadlines, so will they. Feeling burned-out or working excessive hours may be a signal that you're holding on to more responsibilities or tasks than is reasonable. Other people may well be able to do things that you've been doing yourself.

Why do managers have a hard time delegating?

You would think that one good thing about being the boss would be the chance to hand off some of the work to other people. Yet overworked managers frequently need to be reminded that they could be delegating some of their tasks. If you find yourself overworked, and still doing most of the work yourself, it may be for one of the following reasons:

- *You are a perfectionist.* You know your employees are competent, but you feel certain that you can do it even better. Some managers actually compete with their employees whether they are aware of it or not.
- *You feel you have to protect yourself.* You know your employees don't know how to do certain things, or at least not well enough. If they do a poor job, you'll look bad and may not get a raise, bonus, or promotion. This is not an unreasonable fear, but the answer lies in effective training and delegation, not in trying to do all the work yourself.
- *It takes too much time to explain and follow up.* It's just easier to do it yourself and get it right the first time. But this creates a scenario that is almost sure to fail eventually. Employees become more and more dependent, and less able to act on their own. Research shows that employees become disengaged and unmotivated when managers don't delegate effectively.
- *You enjoy doing those tasks.* You don't want to give them away. You just wish you had enough time to do them all. Managers that continue to feel this way and do not gain enjoyment and satisfaction from watching their employees succeed sometimes find themselves happier in roles where they work as individual contributors.
- *You're new in the role and still don't feel comfortable imposing on others.* Not long ago, some of these people were your peers, and you feel uncomfortable telling them to do your work for you.
- *You are concerned that employees are already working too hard and you are reluctant to assign more work.* You may be worried that you will overload employees, which will lead to more missed deadlines as well as general dissatisfaction.

All of these “reasons” for not delegating only perpetuate your problem. And they overlook the important fact that, even if your employees cannot carry out some task as well as you can, some of them could learn to do so, or at least to do it as well as required.

What to delegate

Review what tasks you are doing and how long you spend at them. When a task is scattered throughout the day or week or month, you may seriously underestimate how much time you spend at it. Remember, when you’re doing the work, you’re not managing the work. Instead, you’re attending to tasks that could well be handled by qualified, lower-cost people. This is referred to as division of labor, a key management principle that suggests that work should be done by workers best qualified to do it at the least expense to the organization. Consider delegating some of those tasks. You may need your own boss’s help in deciding what to delegate, especially if you often feel that you’re the only one who can do most of your group’s work.

Ask yourself, “How much of the work that I currently do myself would I hand off to my employees if I were comfortable that the work would be completed, fully meeting quality parameters?” When asked this question, many managers respond that they would hand off up to 50 percent of their workload.

Here are some examples of good tasks to delegate:

- *Delegate tasks you do over and over.* You’ve probably mastered them, but employees could learn new skills by doing them.
- *Delegate a less-than-essential task that requires skills you don’t currently have.* Although learning a new skill may be fun and interesting, it can take a lot of extra time. Why not let one of your employees become the expert in that task?
- *Delegate tasks that don’t have immediate deadlines.* These provide good opportunities for employees to learn without too much pressure. Your employees may learn critical project management skills.
- *Delegate a task to an employee who has shown a particular interest in it.* Start teaching the employee how it’s done by delegating some or all of it.
- *Delegate a task to an employee who needs to work on a skill in that area.* This could be anything from awkwardness at running meetings to failure to meet deadlines, to inability to negotiate effectively with suppliers. Use delegation, with plenty of support, to help the employee overcome this obstacle and enjoy a better chance for advancement.
- *Delegate tasks that will prepare employees for positions the company needs, or will need, to fill.* Your boss may have a more complete long-term view that is helpful in assessing this. Your organization’s ability to attract and retain the best people will

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depend, at least in part, on the number of opportunities for advancement employees receive. Delegation can provide excellent opportunities for workers to develop their careers.

- *Delegate tasks to fill gaps in your employees' present capabilities.* For each employee, analyze the gap between his present capabilities and the positions to which he might like to advance.

What not to delegate

Not everything is appropriate for delegation. Do not delegate a task that is so unpleasant, demeaning, or risky that you wouldn't want to do it yourself. Similarly, don't assign tasks to employees where there is a significant mismatch between the project requirements and the employee's capabilities. Work that is clearly your responsibility -- a crisis, something that is confidential, or personnel issues -- are best handled by you. Also do not delegate anything your manager has asked you to handle yourself without first checking with your manager.

Finally, do not delegate anything that can be eliminated. All too often, work continues to be done because it has always been done. If you set aside time to review your department's work, you will probably find opportunities to streamline processes and procedures so that you can focus more energy on initiatives most critical to organizational success.

How to delegate

Here are suggestions on how to delegate:

- *Give a clear description of the task.* This includes:
 - what you want done (requirements)
 - when you want it done (deadline)
 - assignment parameters (scope of authority)
 - why you want it done (purpose and how it fits into overall goals or objectives)
 - available tools and resources
 - possible challenges or obstacles to consider

For example, you may ask an employee to look into possible suppliers for something you've never had to buy before, and report to you in two weeks with information and a recommendation. To set the parameters, you might say, "Talk to enough people to get a good feel for the subject, but no more than eight." Explaining the purpose helps the employee determine how to go about the task. Seeking a supplier for an immediate need and looking into suppliers for a possible future need might be carried out differently.

- *Specify what you expect the employee to learn.* You might say, "I'm turning this over to you so that you can learn more about plant management. I want you to pay

attention to how the policies we set are actually playing out in the plant and what obstacles they run up against.” Remember that even assignments that don’t involve new skills can provide learning opportunities. Start small. By gradually increasing the amount of work you delegate, you can help employees gain confidence and proficiency while easing your own transition away from these tasks.

- *Ask your employee for his ideas on how to proceed.* This would include the timeline and the resources needed. He might need time to work up thorough answers to those questions. Say, for example, “Tell me what you see as the right next steps, or action plan.” Remember that your employee’s ideas may be different from how you would proceed, but they may represent another way to successfully complete the project.
- *Provide the appropriate resources.* Delegation without proper tools, resources, information, or authority to act will almost certainly fail. If available, provide a sample of what the completed project should look like. Also, make sure your employee knows who she can go to for help if you are not available for questions or problem solving.
- *Make clear what level of authority you are giving your employee.* Does he have to check with you before spending money, before talking to people outside the department, before contacting customers? Do you want to be informed of planned actions before they’re implemented, or is it sufficient for the employee to simply keep you updated? Can he handle everything, reporting on results achieved? Or, will you want weekly progress reports? Delegation doesn’t have to be an “all or nothing” proposition; you can choose a level of authority to delegate that is appropriate for the assignment and the employee’s experience.
- *Try to delegate complete jobs, rather than portions of jobs* This gives employees the chance to come up with creative solutions from start to finish and feel a sense of ownership and pride about their work.
- *Remember that you are delegating responsibilities, not methods.* While it’s fine to talk about techniques you have found helpful, keep in mind that not every person will do the same job the same way. Your employee may even find a way to do the job that you have overlooked. When you require employees to work exactly the way you do, you lose the opportunity to leverage their individual strengths.
- *Be clear about performance expectations and behaviors.* Coaching is helpful, especially if the employee is taking on new tasks or a new role. For example, you might say, “When you meet with the client, you can’t be as informal as we are around the office. Be sure to address the president as ‘Mr. Robinson,’ not ‘Bill.’”
- *Agree together on a plan, with steps, milestones, and points of supervision and approval along the way.* Be sure to agree on how often you’ll meet for updates, and what level of assistance you’ll be giving and how often. When problems arise,

encourage your employee and help her to problem solve, instead of taking the project back and completing it yourself.

- *Express confidence in your employee's abilities.* Research shows that people live up to or down to our expectations. It's important to realize how much your support and confidence can help an employee succeed as well as how much your hesitation or lack of confidence, even if never stated verbally, can undermine a positive outcome.

Give employees a chance to learn from their mistakes

Sometimes it's helpful to let an employee make a mistake. Mistakes are important learning experiences. It's important for employees to know that you will tolerate human imperfection. Encourage employees to be open when a mistake has been made.

- *Use factual feedback when pointing out areas for improvement.* Focus your feedback on actions, not personality. This will reduce defensiveness and ensure that employees really hear your input. Be objective, matter of fact, and specific when describing any performance gaps. Make sure that you also give the employee credit for all that went well with the assignment.
- *Ask the employee to reflect on "lessons learned."* Regardless of whether a mistake occurs, it's important to encourage the employee to digest his or her experience. "What would you do differently?" "What did you see as critical factors for the success of the project?" "What are the two most important insights you've gained from this experience?" "Learning" questions like these will help the person apply her experiences to other situations. However, questions such as "Why didn't you use these data?" are often perceived as accusatory and raise defensiveness while blocking learning.
- *If employees feel they can't afford to make mistakes,* they'll be too cautious and defensive to learn much from the tasks you delegate.
- *If employees feel they need to hide their mistakes from you,* those hidden mistakes will undermine your group's success and productivity. You may find out about errors too late to correct them or to avert serious consequences.

Always follow up

To delegate is to trade one kind of work for another. You still have to manage, coach, and appraise. Once you've handed off the job with appropriate clarity, resources, and authority, these tasks remain:

- *Meet regularly, as arranged.* Answer questions, give feedback, and continue to coach your employee so she keeps learning. Ask for a report on progress and a candid evaluation of how the project is going.

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- *If your employee is working with other managers at your level or above, check with them to see how he is doing.* However, be careful not to undermine whatever authority you have given your employee to act on his own.
- *Seek feedback from your employee.* As part of reviewing a completed assignment, ask your employee for feedback on anything that would improve the delegating process. You can get great ideas about ways to maximize your effectiveness from your employees.
- *Write up notes on your employee's performance.* Use these as input for the employee's next performance review.

A healthy amount of delegation helps you build your group into a strong team, with a shared sense of mission and responsibility. Individuals see that you are investing your time and effort in their growth and their future in the company.

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