

How To Delegate: Understanding The Process



If you delegate a task and it doesn't get done to your satisfaction, the blame for that rests firmly on your shoulders, not the other person. It will be because you did not do one or more of the following.

- 1. Select the Right Person.** The right person is someone who is both willing and able to do it and do it well. Is the person able, in terms of ability and current capacity? Are they willing and committed to doing it well? This is true if you are selecting someone already in the business, or recruiting new help. This will then define what you need to do in step 2.
- 2. Train and Develop the Individual.** People may not be able to do all the tasks you want to delegate. Training may need to take place beforehand. Are you prepared to do this? Do you know how to do this well?
- 3. Briefing the Delegate and Checking Understanding.** Don't be mistaken that the message you sent is the same as the message received. Be clear on the detail: deliverables, budgets, timelines, what good looks like, decision making authority (or not), the context around the task and why it is important. Check understanding; confirm in writing.
- 4. Agreeing control, reporting and support process during the task / project delegated.** This is where you manage risk and decide the level of oversight needed. Whatever oversight is agreed at the start should be adhered to. It's OK to have a high level of oversight the first few times someone is doing a task. Once competence and trust is proved, relax controls.
- 5. Delivery and review of completed work: often missed out.** This is the time to reflect, learn, both sides to give feedback on process, then adapt and improve for next time.

How To Delegate – What, Who, How



What development is needed and what is the best way to do that?

What level of detail and instruction do you need to focus on in the briefing? (outcomes, process, impact of success or failure, budget, timelines)

What level of oversight and control do you need? (on decisions being taken, on progress being made, on methodology being used)

Delegation & Empowered Decisions



This template allows you to think through who is allowed to take the likely decisions that will need to be made as a task is undertaken. What are you happy with the person you are delegating to “make a call on”? What decisions do you want to stay in control of? E.g. you can change the layout but not the process

Decisions that you are happy for the person to take when completing the task	Decisions that are brought to you and taken together

Delegation Review Process



Was the assessment of the person's skills and motivation accurate?

How good was the training to upskill?

How was the briefing process and what was missed or could be improved next time?

Did we get the level of oversight right? What could be improved next time?

Did we get the decision making authority right? What could be improved next time?

What else could be improved?