

DELEGATING FOR RESULTS

Self-Paced Guide



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Table of Contents

How will this Reference Help?	3
DELEGATING TODAY	5
Why Delegate?	5
What is Delegation?	9
Benefits of Delegation.....	10
Delegation Process.....	11
Delegation in Today's Workplace.....	12
PREPARING TO DELEGATE	13
What Can be Delegated?	13
Responsibility	14
Experience and Trust	16
Matching Person to Task.....	18
Delegation Checklist	20
DELEGATING	21
Handover and Step Back	21
Review and Support	24
Acknowledge Results	26
BARRIERS TO DELEGATION	28
The Reluctant Delegator	28
The Reluctant Delegatee	30
DELEGATING TO DEVELOP OTHERS	33
Developing Skills	33
Effective Delegation.....	34
REVIEW YOUR LEARNING	35
What have you learnt?	35

How will this Reference Help?

This reference will help you effectively delegate so that you can achieve your goals and in doing so, develop your team. You'll learn what, to whom and how to delegate for a successful outcome.

Delegation will save you time. If you're hesitant to delegate, do you believe that there is only one way to do it? Your way?

Delegating means having a clear idea of what your goals and responsibilities are. You may have already delegated some tasks and projects. Your challenge? Delegate more!

Successful delegating doesn't mean dumping the routine tasks that you hate onto someone else. When you delegate, hand over some of the fun stuff as well.

This guide will help you to;

- Define delegation in terms of today's workplace
- Identify the steps of the delegation process
- Recognise the types of tasks suitable for delegation
- Describe the four levels of responsibility when delegating a task
- Recognise the importance of assessing the levels of experience and trust
- Demonstrating how to match the most appropriate person to a task
- Recognising an effective handover
- Explaining the benefits of review
- Identifying the main barriers to delegation
- Explaining how delegation can develop knowledge, skill, experience, and confidence.

Delegation will take you out of your comfort zone. Be prepared to deal with the issues that come up, using techniques provided.

Remember! Mistakes are opportunities to learn for both you and to whom you delegate to.

Effective delegation is a skill. You need to practise, and not expect too much at the outset. There will be problems. You will make mistakes. Those to whom you delegate will make mistakes. However, in terms of getting things done, the more you can delegate, the more freedom you will have.

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How will this Reference Help?, Continued

To complete this learning effectively you need to follow the instructions in this Reference Guide. Each section will help you achieve one or more of the learning outcomes.

There are a number of activities to help you develop the skills and knowledge required to delegate for results. They may ask you to answer questions, discuss issues with others or find additional information.

As you follow the sections, you will notice a number of icon prompts. Each icon signals different types of activities that you may or may not wish to do.



TIP



HINT



ACTIVITY

As you progress through this guide you may wish to refer to your manager for assistance or information. Your manager is there to support your learning.

DELEGATING TODAY

Why Delegate?

Delegation is not about juggling your tasks, it's about sharing the workload amongst the team in order to achieve the best results.

Many people underestimate the value of delegation. It is a tool that develops skills and experience within both teams and organisations. It maximises the use of time, resources, and expertise, allowing each person to perform the tasks most appropriate for them to carry out.

If you pass work to someone and forget about it, you are 'off loading' or 'dumping'. This may result in a negative reaction, and if a person has a negative reaction when asked to do something, it will affect how they carry out the task.

NEGATIVE REACTION = POOR PERFORMANCE

If you delegate, you retain ultimate responsibility for the task and remain actively involved throughout the delegation process. The amount of responsibility delegated along with the task will determine how involved you need to remain.

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Why Delegate?, Continued



ACTIVITY

Lets look at how effectively you currently delegate.

Answer the questions in the following table by placing a tick in the relevant column.

How often do you...	Always	Usually	Occasionally	Never	Score
1. prefer to do everything yourself?					
2. consider a person's capabilities before you hand work over to them?					
3. run out of time on projects?					
4. let everyone concerned know who is handling a task?					
5. delegate only the routine tasks?					
6. ask people their opinions when delegating a task?					
7. explain in detail exactly how you want a task to be done before handing it over?					
8. take back a delegated task if the person is struggling with it?					
9. acknowledge results?					
10. only delegate to people you know will do the job well?					
TOTAL					

Continued on next page

Why Delegate?, Continued

Now using the following table, locate your score for each of your answers. Write your score in the column provided beside your answers.

Scoring

Q	Always	Usually	Occasionally	Never
1.	4	3	2	1
2.	1	2	3	4
3.	4	3	2	1
4.	1	2	3	4
5.	4	3	2	1
6.	1	2	3	4
7.	4	3	2	1
8.	4	3	2	1
9.	1	2	3	4
10.	4	3	2	1

Add up all your scores to find your total. Refer to the table below for an explanation of current delegation skill level.

Total Score	Explanation
10	Your delegation skills appear to be excellent
11-16	Your delegation skills appear to be good
17-24	Your delegation skills appear to need some practice
25-32	Your delegation skills appear to need improving
33-40	You appear to have a lack of understanding of what delegation involves.

Continued on next page

Why Delegate?, Continued



TIP

Are you a good delegator?

A good delegator...	A poor delegator...
<ul style="list-style-type: none">• Considers a person's capabilities before handing work over to them. This ensures that the most appropriate person is selected for the task.• Lets everyone concerned know who is handling a task. This shows confidence in the person doing the task.• Asks people their opinions when delegating a task to them. This helps gain their commitment to doing the task.• Acknowledges results and builds rapport.	<ul style="list-style-type: none">• Tries to do everything themselves and often runs out of time.• Delegates only the routine tasks and may encounter resistance.• Explains in detail exactly how a task must be done before handing it over. This undermines the person's abilities and stifles initiative.• Takes back a delegated task when the person is struggling with it. This may adversely affect the person's confidence.• Only delegates to people they know will do the job well, and may overload some people and under-utilise others.

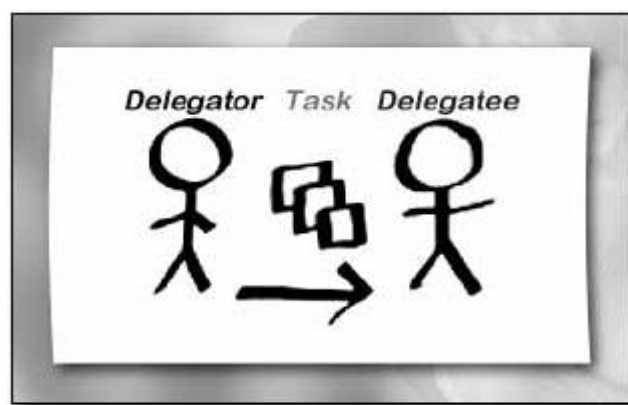
What is Delegation?

Delegation is one person, who is ultimately responsible for a task, entrusting that task, or parts of the task, to another person, who would not normally do the task. Put more simply, delegation is when you entrust one of the tasks you are responsible for to someone who doesn't usually do it.

When you entrust something to somebody, you share responsibility for the task. You have confidence in the person's capabilities, feel you can rely on them to do the job well, and trust their commitment to the task and the organisation.

There are three aspects to any delegation – the delegator, the delegatee, and the task.

- **The delegator** is the person entrusting the task to another person. Two misconceptions about the delegator are that they need to be a manager and that they need to know how to do the task before they can delegate it. This is not necessarily true. Delegation can occur in all directions in the organisation – up, down, and at the same level. A delegator always retains ultimate responsibility for the results of the task being completed.
- **The delegatee** is the person receiving the task from the delegator. A misconception about the delegatee is that they need to know how to do the delegated task before they can take it on. However, delegation is a good way to learn skills. The delegator should use the opportunity to coach and guide the delegatee throughout the Delegation Process.
- **The task** is the work being delegated. The task may be anything from a specific, small-scale activity, like making a copy of a document, to a large project that may take weeks.



Benefits of Delegation

Delegation is not a one-way process from delegator to delegatee, but a two-way negotiation. Delegation should benefit both parties, as well as the team and the organisation.

- The delegator benefits by being able to concentrate on those tasks that only they can do, therefore having time to better manage resources and tasks. The delegator also gets to know people's capabilities.
 - The delegatee benefits by having a chance to show what they can do, and gaining knowledge, skill, experience, and confidence.
 - The organisation benefits by saving time and money. Tasks can be done concurrently and by the most appropriate person.
-

Delegation Process

The Delegation Process is comprised of nine steps which fall into two phases – the preparation phase and the delegation phase.

The Delegation Process is straightforward and can be used effectively even when there are time constraints.

Step	Action
1.	Select a task to be delegated Select from your tasks a task that is not related to your key role and either provides a challenge for someone else or could be done by somebody with a more appropriate skill.
2.	Define the task clearly to yourself Understand the task fully so that you can brief the person you are delegating to.
3.	Select the right person for the job Choose the person who has the ability, knowledge, skills and time to get the job done. Delegation to the right person should improve skills, morale and esteem.
4.	Conduct a thorough briefing Seek feedback and encourage questions to eliminate any confusion.
5.	Delegate authority Make sure to tell them and other staff how much authority you are handing over.
6.	Be available Ensure that you keep the lines of communication open, be accessible.
7.	Monitor Keep an eye on progress, set up times in advance for reporting progress.
8.	Recognise and reward performance Recognition will increase your effectiveness in working through others.
9.	Delegate as part of a master plan See delegation as part of the process of planned growth for your team.

Delegation in Today's Workplace



ACTIVITY

Complete the following activity to identify issues and constraints for delegation in today's team based workplace.

Using the following table, list a couple of recent examples of delegation you were involved in. Who did you delegate too? Was there any issues or constraints with the delegation? How did you handle these issues?

Example	Delegated to	Issues &/or Constraints
		<i>I handled this by...</i>
		<i>I handled this by...</i>
		<i>I handled this by...</i>
		<i>I handled this by...</i>

Would you handle the same situation differently now?

PREPARING TO DELEGATE

What can be Delegated?

Not all tasks are suitable for delegation. Tasks may have more than one reason why they are suitable or unsuitable to delegate.



ACTIVITY

Using the table below, list several of your current tasks.

Identify which of your tasks you think may be suitable for delegation and which may not.

Task

Read the following principles and then review your list. Would you still delegate the same tasks?

Types of tasks **suitable for delegation**;

- Tasks that are frequent and necessary
- Tasks that require specialist knowledge and skills that you don't have
- Tasks that will develop people
- Tasks that will add variety to someone's work
- Tasks that will make a person's role complete
- Tasks that will make more people able to do critical work
- Tasks that use creative talent

Types of tasks **unsuitable for delegation**;

- Tasks that have been personally entrusted to you
- Tasks that deal with confidential matters
- Tasks requiring the level of authority your position holds
- Tasks involving policy making
- Tasks involving sensitive issues

Responsibility

Although the delegator always retains ultimate responsibility for the completion of the delegated task, it is desirable to delegate as much responsibility as possible. This will release more of your time and give the delegatee a true sense of ownership for the task.

There are 4 levels of responsibility that a task can carry.

Level 1 – Perform and report back

The delegatee would be expected to do the task following the instructions given, and report back immediately. If any decisions need to be made, the delegatee would refer to the delegator.

Level 2 – Suggest ideas

The delegatee would be expected to take on the task, analyse it, and come back to the delegator with ideas for a solution. The delegator would then make decisions based on the delegatee's ideas.

Level 3 – Find a solution and report back

The delegatee would be expected to find a solution and complete the task, then report back with the outcomes. The delegator would then check the completed work and either give approval or suggest changes.

Level 4 – Solve the problem

The delegatee would be expected to take responsibility for the completion of the entire task. Because the delegator always maintains ultimate responsibility, they would want to be informed of the task's completion, but would not expect to check the outcomes.

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Responsibility, Continued



ACTIVITY

Using the tasks identified in the previous activity, assign a level of responsibility (1-4) for each. Why did you select this level?

Task	Level of Responsibility	Why?

Experience and Trust

Once you have assessed each task according to its level of responsibility, you need to think about the people to whom you can delegate. Consider the amount of experience they have and how much you trust them to do this particular task well.

It takes time to gain experience and build trust. If you don't know enough to assess someone, you may need to get feedback from others.

Level of experience: Experience involves a person's education, training, skills, and practice on the job in regards to the task in question. It also encompasses how familiar the person is with the organisation's culture.

Level of trust: Trust involves the level of confidence you have in a person, and how much you feel you can rely on them to do the task in question well. It also implies belief in the person's commitment to the task and the team.

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Experience and Trust, Continued



ACTIVITY - Who can you delegate to?

Using the table below, list all the people to whom you can delegate.

Keeping one of your identified tasks in mind, assess each person in terms of their experience and the level of trust you have in them and mark it on the scale provided.

Task: _____

Note: Don't let the other tasks selected earlier influence your response – matching people to task will come later.

Person	Experience	Trust
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>
	<div> <div></div> <div>LowHigh</div> </div>	<div> <div></div> <div>Not confidentConfident</div> </div>

Matching Person to Task

Matching people to tasks is a subjective process. Your assessment of each person will depend on your working relationship with them. You need to be flexible when selecting the best person for each task. The level of responsibility delegated may have to change depending on who is available to do the task.

There may be a legitimate reason why someone can't take on a delegated task. The person may lack the time, resources, credibility, knowledge and skill, or confidence. In each instance the delegator may be able to help.

- If the delegatee lacks time, you could defer the task until the delegatee does have time, or you could reprioritise the delegatee's current tasks.
- If the delegatee lacks resources, you could provide the necessary resources or tell the delegatee where resources can be found.
- If the delegatee lacks credibility, you could actively work at building their credibility within the team or organisation.
- If the delegatee lacks knowledge or skills, you could arrange for the delegatee to acquire the skills and knowledge.
- If the delegatee lacks confidence, you could give reassurance and offer assistance.

Although these constraints may only show up when you approach the delegatee, it is a good idea to consider them when planning. You may find that you have to delegate the task to someone else if the delegatee has constraints you cannot overcome.



TIP

Delegation rests on knowing the people you can delegate to, so spend a little time evaluating your relationship with them.

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Matching Person to Task, Continued



ACTIVITY

Review the following lists of tasks.

1. Prepare a written report
2. Attend a conference
3. Prepare and present a paper
4. Conduct a coaching session
5. Draw up work procedures for a particular job

Write a short profile, listing job responsibilities, work experience, strengths and work interests of a person that would suit having these tasks delegated to them.

What would you be looking for in the person you would delegate to?



HINT

Always remember that;

- Some tasks are easier to delegate than others
- Matching a person to a task is subjective
- It is important to be flexible – you may have to settle for someone other than your first choice when you handover the task.

Delegation Checklist



ACTIVITY

Using the work you completed in the previous activities, create a delegation checklist using the template below.

Match each task to the appropriate person and identify any possible constraints and what you would do to overcome such a constraint.

Task	Level of responsibility	Person	Constraint & action



HINT

Remember...

- The decision to delegate always lies with you, the delegator, as you hold ultimate responsibility for the successful completion of the task.
 - A task can be delegated at various levels, depending on the nature of the task and the person you intend delegating to.
 - Preparation provides the foundation for a successful delegation.
-

DELEGATING

Handover and Step Back

There are four criteria for a successful handover.

What?

What are the desired results and what level of responsibility is being delegated? If the delegatee is not sure what they are to do, or the amount of responsibility they have, the desired results may not be achieved.

When?

When is the deadline and are there any checkpoints? If the delegatee is not sure when the task or section of a task needs to be completed, they may run out of time.

Why?

Why does the task need to be done by the nominated person and how does it fit into the big picture? If the delegatee is not aware of the importance of the task, or their role in its completion, they may be reluctant to do it and consequently do a poor job.

Where?

Where can resources, assistance and guidance be found? If the delegatee is not given the necessary assistance, guidance or resources, a lot of time may be wasted and the desired results may not be achieved.



TIP

You should delegate everything that you do so well that you could do it in your sleep, and that isn't providing a learning experience for you any longer. When you handover the task, don't hand over a long list of ways and means. Just hand the task to the delegatee, and trust them to handle it in their own way. When you delegate, you hand over responsibility to another person, along with the authority to make his or her own decisions.

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Handover and Step Back, Continued

Making sure that the four criteria of a successful handover are covered will reduce the chance of misunderstanding and make reviews easier.

Unless there is only one way to do a task, the delegator should not dictate how the task should be done. Doing so undermines a person's abilities and stifles their initiative. As long as the desired results are achieved on time, and using the agreed resources, the method of completing the task should be left up to the delegatee.

A handover is not complete until the delegatee has accepted and is committed to doing the task, and the delegator feels assured that it will be done.

Once handover is complete, the delegator should step back from the delegatee and allow them to proceed without interference. If the delegator interferes too much, the delegatee may feel crowded or not trusted. However, the delegator needs to monitor progress closely enough to be confident that the task is on track.

How closely you need to monitor progress will depend on the level of responsibility you delegate along with the task.

Continued on next page

Handover and Step Back, Continued



ACTIVITY

Select one of your tasks listed in the previous activities and work out the What, When, Why and Where that you will need to communicate to your delegatee.

Criterion	Explanation	Comments
What?	<ul style="list-style-type: none">What are the desired results and what level of responsibility is being delegated?	
When?	<ul style="list-style-type: none">When is the deadline and are there any points along the way you would need to check up?	
Why?	<ul style="list-style-type: none">Why does the task need to be done by the nominated person and how does it fit into the big picture?	
Where?	<ul style="list-style-type: none">Where can resources, assistance, and guidance be found?	



HINT

A handover involves both the delegator and the delegatee, and each has a responsibility.

Review and Support

The purpose of review is to keep the delegator informed, the delegatee motivated, and the task on track. It is important to balance reviewing the task with supporting the person.

Begin with a positive statement and then provide constructive criticism. When commenting on the task, be as specific as possible.

Encourage the person by asking for and reinforcing their opinions. Build confidence by giving genuine and specific praise, and confine criticism to the task.



TIP

Inexperienced people need closer monitoring and more assistance than experienced people, but even if the delegatee is experienced, the delegator should remain actively involved throughout the Delegation Process. Reviews are just as valuable for motivating people and building rapport as they are for keeping the task on track.



HINT

Even if the task is on track, review should not be neglected, as the person may need support and encouragement.

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Review and Support, Continued



ACTIVITY

Read the scenario below and decide whether Pam needs help with the task or support. How could Peter assist Pam?

Peter asks Pam to attend a conference and prepare a brief presentation to the team afterwards. Pam attends and enjoys the conference. She is now busy preparing her presentation. Peter visits Pam to review the task.

Peter: How was the conference?

Pam: Great, really interesting

Peter: Good, I'm looking forward to hearing about it this afternoon at the team meeting.

Pam: Yes, well, I hope I'm ready by then.

Peter: Why, is there a problem?

Pam: Well, I'm a little nervous about presenting in front of the whole team.

Peter could...

Acknowledge Results

The delegator can recognise effort and show appreciation in a number of ways;

- Face to face,
- Publicly, or
- Remotely.

The way you choose to give recognition will depend on the task and the person, but whatever the situation – don't forget to do it! Ignoring a person's effort will adversely affect their confidence and build barriers. Delegation is a shared responsibility, so if results are not what you expected, there may be inadequacies in the way you delegated the task.

Recognition is only one side of acknowledgement; the other is how the delegatee feels they gained personally from doing the delegated task. Delegatees can gain credibility, confidence, knowledge, skills, and experience.

It is important that the delegatee can see some personal benefit in doing the task, otherwise they may be reluctant to do it and consequently be dissatisfied with the results.



ACTIVITY

From the previous activities, select a task from your list and assume it has been completed successfully by a delegatee.

Decide how you will recognise the effort and show appreciation, and how you think the delegatee could have gained personally from completing the delegated task.

Task

Method of recognition most suitable

Ways delegatee could have gained personally

Continued on next page

Acknowledge Results, Continued

Choosing a way to acknowledge a delegatee's effort will depend on the task, the person and the situation.

Whatever the results, acknowledging effort should never be neglected.

BARRIERS TO DELEGATION

The Reluctant Delegator



ACTIVITY

There are many reasons why someone may be reluctant to delegate.

The passing on of responsibility for doing a task can result in fears about delegating.

There are ways to overcome the barriers if they are affecting the productivity of your team.

The table below highlights a number of common barriers. For each barrier, identify possible causes and suggest some possible solutions.

Common Barrier	Possible Cause	Suggested Solution
What if something goes wrong?		
It looks like I can't cope on my own.		
What if they do it better than I can, and show me up?		
It's quicker to do it myself.		

Continued on next page

The Reluctant Delegator, Continued

Common Barrier	Possible Cause	Suggested Solution
I'd rather do that job.		
No one can do it as well as I can.		
I may lose popularity.		
I don't want to overload people.		
It may cause friction; I'll just do it myself.		

Overcoming barriers by implementing the Delegation Process will maximise the use of time, resources and expertise.

The Reluctant Delegatee

When someone is reluctant to do something you asked them to do, there are two probable reasons: they are unable to do the task, or they are unwilling – they just don't want to do it.

- If the delegatee is unable to do the task because they don't have the necessary knowledge or skills, you can arrange for them to acquire the skill – for example, through a coaching session.
- If the delegatee is able but still unwilling to do the task, you should discuss the situation with them.

Find out why someone is reluctant to accept a delegated task and seek a solution together. You may be able to change the person's mind or the way the task is being done.

Unless someone sees some point to what they do, they will lose interest very quickly. People need to feel valued and accepted. It is important to keep this in mind throughout the Delegation Process.

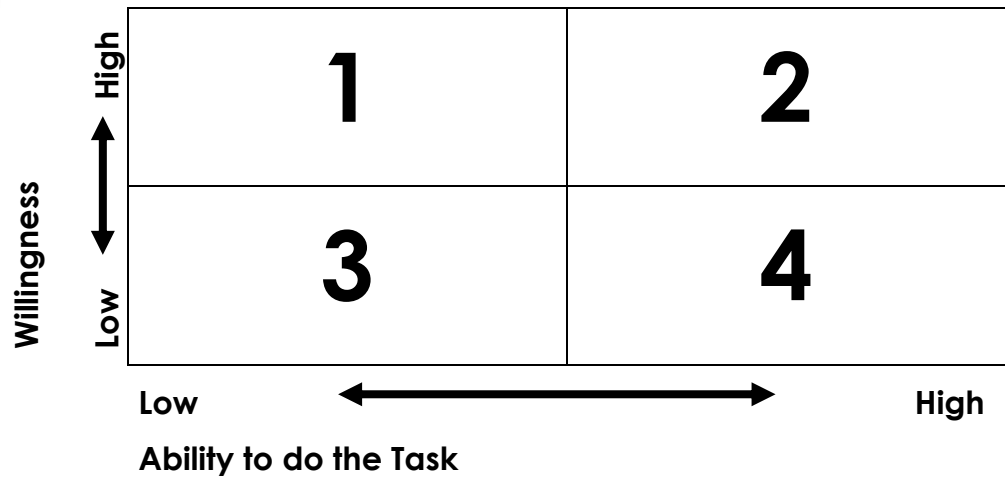
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The Reluctant Delegatee, Continued



ACTIVITY

If faced with each of these possible situations with a delegatee, what would you do?



1. Willing/Unable

2. Willing/Able

3. Unwilling/Unable

4. Unwilling/Able

Continued on next page

The Reluctant Delegatee, Continued

The delegatee who is able to do the task but is unwilling is the most difficult situation to handle.

There are some solutions to try, such as coaching, but if they don't work you may have to do the task yourself or give it to someone else.

If the reluctance continues, you may need to commence performance recovery and consult with Human Resources.

DELEGATING TO DEVELOP OTHERS

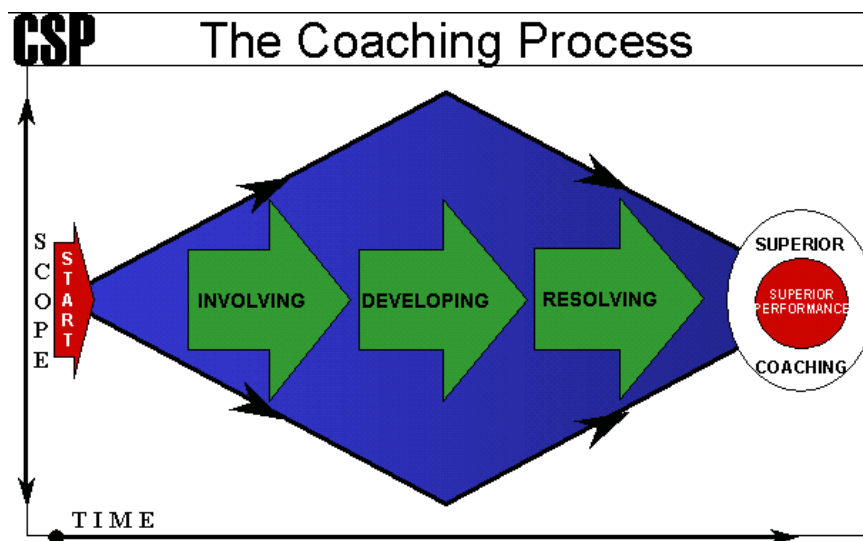
Developing Skills

One of the major benefits of delegation is that it can develop knowledge, skills, experience and confidence in the delegatee. When delegating a task that the person has never done before, you may need to coach and guide the delegatee, allowing more time than usual, reviewing often and handling any mistakes.

Guidance and coaching can vary in form from a quick demonstration to embarking on formal training outside the organisation. When a delegatee has no skill in the area and the delegator does, the most appropriate solution is to arrange a coaching session.

There are three stages to a successful coaching conversation;

1. Involve
2. Develop
3. Resolve



Tasks that are skills-based and procedural are particularly suitable for a coaching session. One of the best ways to learn how to do something is to actually perform the task under guidance.

If a person is new to a task, they will need more scheduled reviews than someone with experience. By having regular reviews, mistakes can be picked up quickly without wasting further time and effort. If the delegatee makes a mistake, avoid taking the task back. This can make the person feel inadequate and defeats the purpose of delegating the task in the first place. Try to get the task back on track and monitor it closely.

Effective Delegation



TIP

Rules of Delegation;

1. Do only what you alone can do, delegate everything else.
 2. Delegate the task, the authority and the responsibility.
 3. You can delegate portions of tasks or projects.
 4. Be specific about the time schedule for the task or project.
Give your delegatee's enough time.
 5. Gauge a delegatee's interest. Little interest usually leads to unsuccessful outcomes.
 6. Put it in writing.
 7. Increased delegation means more time spent in planning and coordination.
 8. Be available but don't hover.
-

REVIEW YOUR LEARNING

What have you learnt?

As well as being aware of what can be delegated and how to delegate effectively, for successful delegation you need to know and use all of the activities and techniques until they become your normal way of doing things.

Over the coming weeks, notice the ways you have changed what you do because of the learning activities you have completed in this Reference Guide.

To assist you in reviewing your learning, compare your performance against the learning outcomes;

- Define delegation in terms of today's workplace
- Identify the steps of the delegation process
- Recognise the types of tasks suitable for delegation
- Describe the four levels of responsibility when delegating a task
- Recognise the importance of assessing the levels of experience and trust
- Demonstrating how to match the most appropriate person to a task
- Recognising an effective handover
- Explaining the benefits of review
- Identifying the main barriers to delegation
- Explaining how delegation can develop knowledge, skill, experience, and confidence.

CONGRATULATIONS on delegating for results!
