



**Brio  
Leadership**

# The Art of Delegation

Getting Things Done Through Others



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Delegation is an art of balancing - balancing what you do versus what you allow others to do. Inexperienced managers often have difficulty learning to delegate, but even seasoned managers must continue to refine their art of delegating. This is serious business! Failure to delegate successfully will negatively affect your effectiveness as you advance in your career or grow your business.

Here is a deep dive into the art of delegating:

### 1. Review managerial roles.

Typically as you get promoted to higher levels of responsibility in an organization, the demands of your position become more strategic and less tactical, and you get more done *through other people* than you do yourself. This can be a challenge for those people who enjoyed and excelled at what they did before their promotion into upper management. It requires a different mindset to get things done through delegation, as you must focus on the satisfaction of seeing your team members grow and develop their own capabilities. As an executive, you assume the primary roles of *trainer/coach, political influencer, visionary, and strategist*. The more advanced your position is within the organization, the more your days must be filled with these activities:

- **Trainer/Coach:** In this role, you should be assigning your team members both formal and informal training opportunities as well as new projects or roles that could stretch their current capabilities. Informal training for employees could include your coaching on a particular topic, a mentoring partnership with another executive, or an introduction to a subject matter expert for knowledge domain mentoring.
- **Political Influencer:** You will represent your team at executive meetings, use your personal relationships with peers to advance your team's projects and objectives, and will work with your boss to influence decisions that are best for the organization. You deal directly only with strategically important accounts and projects but often communicate to clients on a one-to-many basis.
- **Visionary:** As the visionary, you both create and communicate a positive future and direction for your group. Your job is as an encourager and the emotional tone-setter of the group.
- **Strategist:** You facilitate the planning for and executing of the steps needed to achieve the organization's vision.

As you think about delegation, it is important to keep these roles at the forefront of your mind.

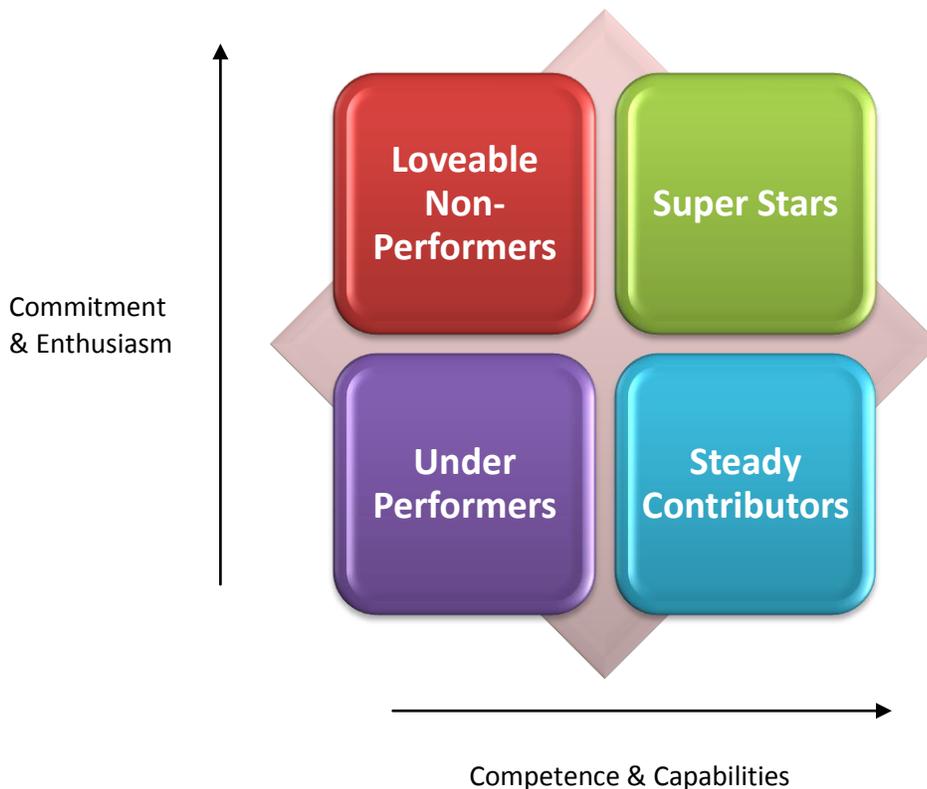


### 2. Determine the skills and maturity of your team.

If you are a new boss to this team, go slowly in assessing the capabilities of your team members. Test the individuals first with minor assignments and evaluate the results with them. As you build trust and a better understanding of their capabilities, you will be able to assign them responsibilities more in line with those capabilities.

With a more familiar team, you will be able to quickly categorize each individual using this matrix:

#### Employee Matrix



- **Super Stars:** Super Stars are wonderful employees who consistently take an assignment, run with it and produce outstanding results. These self-starters assume control for the project because they are highly competent and have a good performance track record. They are candidates for both more challenging assignments and for nuanced coaching from you to smooth out any rough edges in their leadership style. Do NOT micromanage these people, or you will lose them. However, do not ignore them either.



They thrive on positive attention and recognition of a job well done, including equitable pay. You can be comfortable assigning Super Stars more responsibility and challenges.

- **Lovable Non-Performers:** These workers are high on enthusiasm and low on capability, making their performance levels uncertain. They need clear directions, check-in meetings, and direct coaching from you to complete their assignments. Some employees get stuck in this box: they have high self-confidence in their abilities, but their actual competencies do not measure up, no matter what you do to train and coach them. They are enthusiastic workers but low performers. As a rule, these are the right people in the wrong job.
- **Under Performers:** These workers are a drain on a manager’s patience and resources. They lack both the capabilities and the commitment to effectively complete a task. Under Performers need explicit directions, hands-on task training, and frequent (perhaps daily) check-ins to assess progress. Instead of coaching, they need training with specific, step-by-step instructions. You should expect most new employees to fall into this category unless they’ve done a job with similar responsibilities in the past. However, after a reasonable amount of experience, if an employee is still in this box, it’s time to ask if this person is in the right job.
- **Steady Contributors:** Steady Contributors are never going to be your Super Stars, but they perform their tasks with high levels of competence. They know the job, get it done without a lot of supervision from you, and are reliable. Typically, they don’t have the ambition to advance in the organization and are happy to work hard enough to perform at an acceptable level or higher. They need good guidance, clear expectations, and enthusiasm or affirmation of how important their contribution is. Steady Contributors don’t need a lot of hand-holding.

Here is a summary of the employee type and the needed delegation style:

Employee Type:	Delegation Style and Follow-up frequency:
Under Performers	Directive with close supervision. Follow-up frequently.
Lovable Non-Performers	Directive with clear expectations set. Follow-up regularly.
Steady Contributors	Delegate with clear expectations set. Follow-up less frequently.
Super Stars	Delegate with broad guidelines. Follow-up infrequently but regularly.



Now, make a list of your employees and complete the first three columns of the following worksheet. It's too soon to delegate tasks to them:

**Delegation Worksheet**

<b>Employee Name:</b>	<b>Employee Type (Under Performer, Loveable Non-Performer, Steady Contributor, Super Star):</b>	<b>Follow-up frequency:</b>	<b>Tasks to assign:</b>
1. Julia Roberts	Super Star	At bi-weekly 1-on-1 meetings	
2. Tom Hanks	Under Performer	Daily	
3. Susan Sarandon	Steady Contributor	At bi-weekly 1-on-1 meetings	
4.			
5.			
6.			
7.			

**3. List what you do.**

Make a list of all the things you do. You might want to keep this list at your desk for several days, so you can add to it as you think of new items. At this point, you should complete only the first column, as in the following example:

**Task Log**

**Date: 7/10/2014**

<b>Tasks:</b>	<b>4 D's: Do, Delegate, Defer or Deny</b>	<b>To Whom to delegate:</b>
Reading/responding to email, retrieving phone messages		
Make travel arrangements for upcoming trip		
Meeting – Strategy committee		
“		
Meeting – Site volunteer committee		
Returning phone calls from customers or salespeople		



You can also use this template to list all the tasks that the whole team needs to get done.

#### 4. Use the 4 D's to decide what to delegate

In looking over your list of activities for the week(s), apply the “4 D’s” to each one. The 4 D’s are *Do*, *Delegate*, *Defer* and *Deny/Delete*. These are the four decisions available when you analyze the task list you created in the previous step. Here are decision questions for each option:

The 4 D's:	Decision questions:
<b>Do</b>	<ol style="list-style-type: none"> <li>1. Does it need to get done at all? (If not, deny or delete it from your list.)</li> <li>2. Does it need to get done by me, i.e.: does it fit into your value-add task list? (If no, this task should be delegated.)</li> <li>3. What priority does it have – high, medium or low? (This information is used to set a deadline for completion of the activity.)</li> <li>4. Is this something I enjoy doing but doesn't need to be done by me? (If yes, think hard about how necessary it is to do this yourself, as well as whether or not you have time to complete it.)</li> </ol>
<b>Delegate</b>	<ol style="list-style-type: none"> <li>1. Who might learn and grow from taking responsibility for this task?</li> <li>2. Who is best suited for this task?</li> <li>3. Who has time for this task? (See below for further thoughts about a challenging workload.)</li> <li>4. How will I coach this person to do the task?</li> </ol>
<b>Defer</b>	<ol style="list-style-type: none"> <li>1. Is this important but not urgent? (If yes, defer it to your weekly 2-hour strategy time.)</li> </ol>
<b>Deny/Decline</b>	<ol style="list-style-type: none"> <li>1. Is this a distraction from my objectives? If yes, the optimal decision is to deny it.</li> <li>2. Politically, can I say no to this task or request? (If it is a political hot potato, you may need to do or delegate this.)</li> </ol>

Apply the 4 D's to your task log that you created in Step 3 and complete the form. Use the decision questions in the matrix above to decide what to do, delegate, defer, and deny. Then look back on your list of employees and their capabilities and decide who would best benefit from being assigned new tasks.

A few further suggestions are in order about the 4 D's:



- Not only can you apply the 4 D's to your task log created in Step 3, but you can also apply them to your on-going to-do list. The will and ability to delegate tasks, especially those that you are good at, is a career-enhancing skill to develop. Many highly talented executive managers have a hard time giving up tasks that they enjoy doing and are good at; it is a personal loss in some instances to have to delegate favorite tactical activities to employees. The wise executive will find ways to enjoy the challenge of delegation, follow-up and goal achievement through the team. How can you apply your strengths to this challenge?
- A helpful practice is to set aside two hours of strategic time every week and have your administrative assistant guard (if you are lucky enough to have one!) it from any intrusions. If you do not have an administrative assistant, as is the case for most of us today, be sure to block your calendar, forward your desk phone and turn off your cell phone during this protected time. This two-hour block of time is NOT meant for catching up on emails, but for structured thinking about vision, strategy and communication. It is the ideal time to touch up your strategic plan, prepare for the next appointment with your boss, or gather your thoughts for a presentation at the all-hands meeting. When I was an executive in a large company, I would keep a running list of the important-but-not-urgent tasks I came across during the week, saving them up for my "Tuesday morning time". I looked forward to Tuesdays, when I could close my door and do some in-depth thinking and planning without interruption. My employees came to understand that my Tuesday mornings were not to be interrupted unless in the event of a crisis.

### **A note about distractions & diversions for high level managers:**

A distinction should be made between distractions and diversions. A distraction has a negative context in that it distracts you from achieving your goal. Distractions are non-important and non-urgent tasks such as completing your expense report instead of working on the strategic progress report, or perhaps attending a meeting that is tactically focused but comfortable for you. Distractions from your main objectives should be delegated. Diversions, on the other hand, are necessary stress reducers, such as taking a walk, eating lunch away from your desk, etc. It is possible that the same task can be both a distraction and a diversion, depending on the circumstances. Playing a video game, for example, would be a distraction if done when you have a pressing deadline to meet; however, it is a diversion and a stress breaker if done in the midst of a quieter day. What is the distinction in your mind between a distraction and a diversion?



- In a time-challenged work group, getting your boss involved in the prioritization of your tasks is extremely important. In my years of executive coaching, I have not interviewed even one boss who didn't support the concept of prioritization and saying no to distractions, even if important salespeople or customers have requested them. Furthermore, I have seen bosses who, when presented with the list of tasks and asked to prioritize them, have responded with an inquiry into the need for more headcount. A good boss would ask you to document everything your group does (you would start with your personal task list as an example and ask everyone on the team to complete one also), assign work durations to each task, and add them up to indicate the need (or not) for new hires. Brio Leadership can provide you with a staffing template that accounts for shrinkage in employee work time, including vacation, holiday, training, and administrative time.

Lastly, once you have clarified priorities with your boss, consider making a rubric of your high, medium, and low priorities. Draw three boxes, one on top of each other, and mark them High, Medium, and Low. In each box, list the people and issues (the *who* and the *what*) that fit each priority level. Then note the action and response times you commit to for each priority. Your boxes might look like this:

### My Priority Rubric

Priority Bucket:	Who/What:	Actions:
High	My boss; my direct reports; 3 of my peers; high profile customers; high profile vendors	Color code emails from these people; respond within 4 hours; make myself available to them.
Medium	The rest of my peers; inquiries from other departments	Give advance notice that I cannot respond quickly to them. Respond within 48 hours.
Low	Everything and everyone else including other vendors & customers	<u>Ignore</u> , decline or delegate response to my team.

Of special importance is the Low priority. An effective executive knows how to ignore what's not important to him or her. What high level executive do you know who responds to all their



emails? In order to retain sanity, you must ruthlessly prioritize requests for your time and attention, as well as actively ignore those that do not meet the priority test.

For your medium priority people, consider giving advance notice to these people, especially if they are peers, informing them that you will not be responding immediately to their messages. You might suggest a way to request your quick attention; for example, many of my clients tell co-workers to catch their attention with an email subject line that starts with “Action Required:” or “Immediate attention needed:”.

### 5: Delegate and schedule check points

The next step in delegating is to define what you need your employee to do. How you do this depends on the competence and commitment of your team member. Refer to your Delegation Worksheet to see where on the competence/commitment matrix your employees fit. For all employees, the basics are always needed:

#### Defining the Tasks – The Basics:

1. **Purpose:** What is the purpose or objective of the task or project? For example, you may wish for the employee to create a weekly report using the group’s key performance indicators.
2. **Mission:** How does it fit into your goals & objectives, and does it advance the mission of the team or organization? Following the example of the KPI report, you might say, “This report will help us track how we are performing to the objectives we set at the beginning of the year.”
3. **Results:** What results do you expect? What key performance indicators should the report include? For what time frame should the report be run?
4. **Involvement:** Who should be involved? You might say, “Mary has been gathering some of this information from the financial system. Please ask her how to gather and manipulate those metrics.”
5. **Check points:** When would you like a progress report, either in person or via electronic means? “I’d like to see a prototype of the report one week from today. Let’s set up a meeting right now to review it.”
6. **Deadline:** When must it be completed? “We need the report up and running by the beginning of the quarter so I can present it to the leadership team. Does that sound



OK? Great, let’s set up another meeting at the end of the month to review the report’s completion.” Be sure to set the expectation that “bad news early is good news”. In other words, if your employee can’t meet the agreed-on deadline, you as their manager would rather hear about it early in the process, not at the last moment. That way, a contingency plan can be put into place.

Loveable Non-Performers and Under Performers (see the Employee Matrix, above) will need more direction from you, perhaps even a checklist of what to do. If you don’t already have a checklist or documentation for the task you are delegating, ask the employee to create the document as you teach him/her the steps. Once that is finished, you can edit the completed document for accuracy. Follow the basic guidelines as listed above. As previously mentioned, you may need to meet for progress reports daily at first, which is much more frequently than with others.

For Super Stars and Steady Contributors, much less guidance is typically needed. Following the basic guidelines, above, is usually sufficient.

You might use a Delegation Log such as the following. This is supplied in Word document form, but you may wish to convert it to a spreadsheet so you can sort the list by column, depending on need.

**Delegation Log**

<b>Team Member:</b>	<b>Task:</b>	<b>Start Date:</b>	<b>End Date:</b>	<b>Check Point Meeting(s):</b>
<b>Julia Roberts</b>	KPI report	8/1/2014	9/30/2014	8/8/2014, 9/19/2014
<b>Tom Hanks</b>	Take meeting minutes	8/1/2014	Ongoing	Every week
<b>Susan Sarandon</b>	Run the status update meeting	8/1/2014	Ongoing	Monthly

Many of my clients who follow this methodology highly recommend keeping a delegation log. As one of my clients says, “If you don’t follow up and set a precedent, you won’t get what you want. If you don’t inspect, you won’t get what you expect.”

**Step 6: Give credit where credit is due**

We have talked about the mindset critical to effective delegation, and that mindset is one that delights in seeing team members learn, grow, and accomplish. In addition to specific and positive feedback, a good leader will give credit to his or her people when the opportunity



presents itself. You can do this with an email to your boss, Cc'd to the employee, commending that person for a job well done. Also, in meetings be sure to credit the workers for their contribution to a team accomplishment. In this way, you encourage participation and involvement in future projects.

The art of delegation must be practiced in order to become a habit, and such practice will certainly pay large dividends in terms of team effectiveness. The best managers and leaders are constantly honing their delegation skills, knowing that this ability is foundational to both organizational and personal success.

*Templates from this white paper are available at no cost. Please contact Brio Leadership [here](#) to request the templates.*

*Brio Leadership offers consulting, meeting facilitation and executive coaching services for small and mid-sized family-owned business. We can help you develop your leaders through training and coaching, create a succession plan and facilitate strategic planning sessions. Feel free to contact Kristin Robertson, President, at 817-577-7030 or [kristin@brioleadership.com](mailto:kristin@brioleadership.com) to schedule a complimentary 30-minute appointment to discuss the challenges you face with your family-owned business.*