How to Delegate

- Clearly define the task and expected output
- Delegate to an appropriately skilled person or team
- Decide on the way you will communicate problems, progress & feedback
- Provide clarity about access to resources & level of authority bestowed with task
- Agree on a schedule & deadline for completion
- Have an understanding of consequences in the event of failure

Preparing to Delegate

Begin with writing down the list of things that are needed to complete the task. They can be anything from a specific file, to a software application, a customer database, a telephone, email, a computer, a company car etc. If you were creating a cooking recipe then this list would be the ingredients you need.

Resources

The things that are needed to complete the task

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The next step is to start writing out the steps required to do the task.

If this were a recipe these would be the step-by-step instructions on how to prepare and make the cake.

In your mind go through the process of doing the task and as you go through write down the steps you take as short bullet point instructions. You will need to run through this a couple of times so that you can insert more details into your description. Things like the name of the file and where it’s saved, or the name of the button to push and where on the machine it’s located are small yet significant details for someone doing what was your task for the first time.

*If your task involves using software applications, you may even consider recording yourself doing the task with screen capture software such as Camtasia.*

**Step-by-Step Description**
The steps & sequence needed to complete the task
While you’re running through the task in your head also keep in mind the things you look for that tell you that what you’re doing is creating the correct outcome.

In a recipe these would be things like, a description of the mixture consistency, how vigorously to mix the ingredients, the colour of the cake when cooked or how much the dough should rise.

These telltale signs let the other person know that there’s a problem or if they’re on track. How else will you know when it’s done properly?

**Outcome**
The telltale signs that indicate whether the outcome will be achieved correctly
Skill matching is the next thing for you to think about. Are you the only person in the entire organization that is capable of doing this task? Write down the skills you need & use that get you through the task.

Consider all the people in your organization & what you know of their skills. Discover which two or three people would be a good match; these will be the individuals you’ll want to delegate to if you can.

**Skills**
The list of skills needed to do the task

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**Candidates**
List the people who are a good skills match

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As an expert you have found ways to refine the way you do the task & to get it done in the quickest time possible. The person or team you delegate to will not have those advantages. They also have their own existing jobs to do that they’ll need to reschedule to accommodate the new task you’re entrusting them with.

Using as a benchmark the time it takes you, you’ll need to allow adequate time for the other person to learn the task as well as get it done. Be conservative in your estimate, allow lots of extra time so that you take into account troubleshooting, reporting back to you, rework, waiting for sign-offs and input from others.

With your figure in mind, negotiate with the person you will delegate to and listen for overstretching (where the other person is so keen to impress you that they insist on a deadline that even you couldn’t meet) or exaggeration (where the other person is so nervous about the challenge that they want to have so much time it makes delegating seem pointless).

**Deadline**
Allow adequate time to learn and do

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Forgetting to assign authority with a delegated task is something that is commonly overlooked. When assigning authority you’re simple letting the right people in the organization know that the person you’re delegating a task to has your permission to get access to things that are protected and ordinarily they cannot access. These may be protected files, a secured room, permission to act as representative in a meeting, talking to certain clients etc..

By thinking about authority up front you’re able to set things up from the start so that there’s no delay for the person you’ve delegated to.

**Authority**
The permissions, access and approvals needed

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Communication is essential when delegating to others. You are still responsible for the outcome, so it’s important that who ever you delegate to can contact you if things go wrong and get your advice on how to fix it as soon as possible.

By nominating a chain of communication along with the task, you’re signaling that you want the person to take ownership over the task but that you’re there to help them be successful.

A chain of communication is simply an escalation path for getting in touch with you. For example, with a problem that stops the entire task (a bottleneck), the first point may be to get you an email and if you’re unable to respond within 4 hours, you get a voicemail and if you don’t respond to that within 2 hours the person comes to see you in person.
For every task there are certain telltale signs (Outcomes) that signal when things are going off the rails. You want to match your chain of communication to these points of failure and provide the conditions for escalating frequency (how often within a span of time they contact you), changing mode (swapping from email to phone to in-person) or you may even want to direct them to other people in the organization.

Communication
Points of failure & corresponding chain of communication
And finally the consequences of failure.

A reprimand or threat of job loss may be appropriate for some tasks, however most are unlikely to need this level of severity. Simply telling the people you are delegating to what the flow on effects are for the task they’re doing can provide them with the inspiration, motivation and desire to succeed to the highest standard.

Hiding serious consequences such as the loss of a client, an impact to profitability or potential for downsizing if failure occurs can create unexpected detrimental emotional responses from the person who failed to meet their obligation. It is better to be upfront with the person so that if the consequences unfold they are aware of their role in them.

Just like the 14 Day Action Challenge you will get better outcomes if when evaluating results you incorporate learning and review.

**Consequences**
The impact of failure and opportunities for learning