Delegation is a process, not a one-off activity, and it needs to be done well to ensure success. The steps of the process are set out below.

The amount of your time and the level of formality you apply to each step will depend on a number of factors: the nature of the task to be delegated, how critical it is and the level of experience of the person carrying it out. The key point is that you need to include all the steps to ensure success.

Step 1: Define the task
What is the nature of the task you are delegating? Make sure that you have a clear idea in your own mind about what it is you want done. It should meet the criteria for delegation (see What to delegate).

Part of the definition of the task should be to identify the actual customer of the task, internal or external, and decide what a successfully completed task would mean to them. If you don’t know what this is, go and ask them!

Step 2: Choose the person
Consider the checklist in Who to delegate to. If the person to whom you are delegating a task needs any training, make sure it’s in place before they start.

Step 3: Agree objectives and scope
You need to explain what the job is and why you are delegating it to this person. This is critical.

You want to ensure that the person is enthusiastic and motivated to take on this work, and will not see it as just another task to add to their already lengthy to-do list.

You might also want to use the SMART way of agreeing objectives:

- **Specific** – it is very easy to give vague instructions that can be misinterpreted. Give clear guidance and agree together what the scope of the work is and what it isn’t. Are you giving them authority to act, to make decisions, to spend money, or what? Are you asking for a recommendation, but might make a different decision if you disagree? It is essential to agree all of this in advance. Ensure understanding by getting feedback from the other person on what they think they have been asked to do.
- **Measurable** – how will you measure success? Both of you need to understand what the success criteria are. Think about success in terms of benefits also, and what these mean to the task’s customer, rather than just looking to the technical result.
- **Agreed** – make sure that you both agree about all aspects of the task. People cannot be held responsible for something to which they have not agreed and they will be more committed if they have been allowed to contribute to its set up.
- **Realistic** – this might seem obvious, but many people are given unreasonable targets or inadequate budgets. Set your people up for success, not failure. They may need resources – budget, equipment, other people’s time. Whatever they need, it’s your responsibility to make sure that it’s available.
- **Time-bound** – be clear about when things must be completed (both intermediate and final deliverables).
You may also need to inform others that you are delegating this work to this person. These others might include your boss, your peers and/or your customers. Involve the other person in thinking about this, so that they understand the full scope of the work, but do not leave it to them to let others know of their new responsibility. Pay particular attention to any internal politics or difficult situations that might be relevant.

Help your delegate to understand how this task fits into the bigger picture of the organizational goals and mission. This will give them a better sense of why it is important. Don’t just assume that they will know this. If relevant, explain what recognition will be achieved on successful completion of the task.

Step 4: Deal with any concerns or objections

Ensure they answer yes to the following questions:

- Do you know what to do?
- Do you have the resources you need?
- Can you do it?
- Will you deliver according to what we agreed?

Finally, when you have a yes to the first four questions, ask

5. Is there anything else that needs to be discussed?

Please don’t assume the answers. Actually ask the questions.

In effect, you are agreeing a contract with them. It is often a good idea to ask the person to send you an email detailing what they think they have contracted to do.

You need to carry through with this step because you absolutely must know if there are any concerns or objections lurking in the background that could derail the task. These might not even be related to the task: for example, the task may require someone to do something at a certain time each day that will then stop them from using their flexitime arrangements to collect their children from school.

A common reason for reluctance to take on a delegated task is the perceived zone of activity according to the following graph. Ideally you will be delegating tasks into the Stretch or Mastery zones.

The key here is that it is the perception of the delegatee that is important.

If you delegate a task to someone and they end up in the panic zone, you need to alter their perceptions, as they will not be able to perform while in this state. In order to get them, in their mind, to change zones, you must either increase their perception of their competence or decrease their perception of the difficulty of the task. You have several options to consider:

- Point out that they have done something similar before – they may not have made the connection
- Say that they can call on help from another person who has done it before
- Show them how to do it
- Send them on a training course
- Break the task into pieces they consider manageable
- Ensure they have understood the task correctly, as they may see difficulties where there are none
- Redefine the task in terms they understand.

If you delegate a task and the person ends up in the drone zone, there is less you can do, but these types of routine, boring task still need to be done. Try to find some way of increasing the person’s perception of the difficulty of the task, for example:

- You can turn it into a challenge: for example, ‘Sally did this last week in two hours’
- Give them a reward task to do once the boring job is finished
- Give them a frontal lobotomy (joking!)
- Have them do it in parallel with another, more demanding, task
- Have them think about ways to change the process, improving the task
- Delegate two people to the task and make one of them responsible, and a teacher for the other.

Step 5: Let them get on with it

Having set them up, the important thing is to let them get on with it. Trust them to do the job. They will not do it exactly as you would – they may not even do it as well as you could – nevertheless, leave them to get on with it, unless you see something actually going wrong.

If things are going wrong, resist the urge to put them right. Clearly, you want things fixed as quickly as possible, but, equally, you don’t want to create a feeling among your team that you’ll leap in and sort things out whenever they go wrong.

If there is a problem, firstly concentrate on the solution, rather than what caused the problem. Encourage a belief among your team that they can come to you safely and talk to you without being heavily criticized (so, ‘how could you be so stupid?’ is definitely not a recommended opener!). Also encourage them to come with a recommendation or, at least some ideas about what to do.

Make sure that your staff understand why the error occurred and that they agree both the action to be taken to put it right and the changes needed to prevent it happening again.
You want to create a culture where people are not so afraid to admit mistakes that they try and cover them up, but where they actively look for problems and are willing to come and talk to you about them.

**Step 6: Monitor progress**
You will have agreed review points when agreeing objectives. You need to stick to these – missing review meetings will indicate lack of commitment on your part and unscheduled reviews will give the impression that you are interfering. Make sure you cover all the action points from previous meetings and that you have done everything you promised to do! See Project Management for more help.

The key here is doing sufficient monitoring to manage the risks. If someone is new to a task, you may ask them to bring their plan of action to you for approval before they actually start. If they have done the task successfully many times before, you may just need to know when it has been done. See Levels of delegation and there is also more in the topic on Risk Management.

**Step 7: Support and coach them, where appropriate**
You may choose to give formal coaching sessions, reviewing progress, checking concerns and previewing future actions.

You may also need to provide instruction or training. There will be lots of opportunities during the day-to-day work to do this. It is particularly valuable to listen for such opportunities. They might include occasions when
- They ask for your advice
- They ask you to solve a problem
- They ask you to make a decision
- They say something like ‘I’m not sure how to...’ or ‘I can’t...’
- You review a project or piece of work
- You notice something that could be improved
- You are involved in a team task with them.

A simple and effective approach to adopt whenever these opportunities occur is suggested below.

1. Have helping this person to develop as your primary objective.
2. Ask what they want to achieve.
3. Ask questions.
   - Where have they got to?
   - What’s working?
   - What’s not working?
   - What have they tried?
   - What else could they try?
4. Add in any other options and suggestions of your own (if necessary).
5. Ask them what they want to do.
6. Ask them to let you know how it went.
7. Praise them appropriately.

**Step 8: Feedback on results**
Clearly, you need to review with the person whether they have achieved their agreed objectives. More than this, you should discuss how well they have done – what went well and what could be improved. For example, you may learn from them that the process could be improved so the task can be done more easily in the future.

And, if they have succeeded, give them the full credit, both in private and in public.

This is also an ideal opportunity to discuss with them what their next stretching task could be.

If things have not been successful, you must review with them why things did not go to plan and deal with the problems. And then, always, always support them and take any flak that comes.

Remember the definition of delegation – you have trusted them with the authority to act on your behalf. This means that the result is still your responsibility and you must accept that, whatever happens.

If you do this, you will build great trust and loyalty among your team. If you don’t, you will undermine all the good work you have already done.

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**About the Author**
Paul Matthews is People Alchemy’s founder and managing director. Paul’s key skill is in making the ideas come alive with stories, and making sure his listeners receive practical tools and tips to take away and implement.

Paul is a regular speaker at HR and L&D events and exhibitions covering topics such as harnessing the power of informal learning, capability at work, workplace performance, and how L&D can be effective in these tough times.

Paul is the author of Informal Learning at Work: How to Boost Performance in Tough Times, praised as ‘a thought provoking practical book with ideas and insightful examples which challenges us all to embrace informal learning’. The book explains how companies can harness the power of informal learning using practical advice from workplace learning experts and practical examples and case studies from around the world.

His 2014 book Capability at Work: How to Solve the Performance Puzzle has also been widely acclaimed as a ‘must’ for anyone in HR or learning and development.

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