

## FACTOR II: OPERATING SKILLS

### CLUSTER F: GETTING WORK DONE THROUGH OTHERS

# 18 Delegation

*No man will make a great leader who wants to do it all himself or get all the credit for doing it.* Andrew Carnegie – Scottish-born industrialist, businessman, and philanthropist

## Section 1: Your Development Need(s)

### Unskilled

- Doesn't believe in or trust delegation
- Lacks trust and respect in the talent of direct reports and others
- Does most things by him/herself or hoards, keeps the good stuff for him/herself
- Doesn't want or know how to empower others
- May delegate but micromanages and looks over shoulders
- Might delegate but not pass on the authority
- May lack a plan of how to work through others
- May just throw tasks at people; doesn't communicate the bigger picture

*Select one to three of the competencies listed below to use as a substitute for this competency if you decide not to work on it directly.*

Substitutes: 7,19,20,21,23,27,33,35,36,39,47,56,60,64

### Skilled

- Clearly and comfortably delegates both routine and important tasks and decisions
- Broadly shares both responsibility and accountability
- Tends to trust people to perform
- Lets direct reports and others finish their own work

### Overused Skill

- May overdelegate without providing enough direction or help
- May have unrealistic expectations for direct reports and others, or may overstructure tasks and decisions before delegating them to the point of limiting individual initiative
- May not do enough of the work him/herself

*Select one to three of the competencies listed below to work on to compensate for an overuse of this skill.*

Compensators: 7,19,20,21,23,33,35,36,57,60,63,64

### Some Causes

- Delegate but don't follow up
- Delegate by throwing tasks at people
- Delegate little pieces

- Don't develop your people
- Hoard most things to self
- Not plan work
- Not trust others
- Overmanage people
- Too busy
- Too controlling

## Leadership Architect® Factors and Clusters

This competency is in the Operating Skills Factor (II). This competency is in the Getting Work Done Through Others Cluster (F) with: 19, 20, 27, 35. You may want to check other competencies in the same Factor/Cluster for related tips.

### The Map

Do you hoard tasks, keeping the good ones to yourself? Do you throw tasks at people without any overall plan or follow-up? Do you micromanage because you don't trust people will perform? Unless you can do the work of the unit all by yourself, both performance and morale will suffer until you learn to delegate.

## Section 2: Learning on Your Own

*These self-development remedies will help you build your skill(s).*

### Some Remedies

- 1. Need convincing? Learn the benefits of delegating.** How busy are you? Can't get everything done you would like to get to? Boss on your butt for more? No time for reflection? No time to get to long-range planning and strategy? Longer hours? Saturdays? Work at home? Family wondering if you still live there? Postpone vacations? If this sounds familiar, you join the majority of managers. Time is the most precious commodity. There is never enough. One of the main causes of this is that managers do too much themselves. The major fixes are better personal time management and organization, setting better priorities, designing better work flows and delegation. Delegation frees up time. Delegation motivates. Delegation develops people. Delegation gets more done. Learning to delegate is a major transition skill first-line supervisors are supposed to learn when they leave the personal contributor role early in their careers. Read *Becoming a Manager* by Linda A. Hill for how that's supposed to work. We say "supposed to" because there are many high level executives who still have not learned to delegate. They generally get to everything tactical and let everything strategic go until last. They also don't have the time to develop others, leading to their reluctance to delegate because their people aren't good enough! No wonder. You cannot fulfill your potential until you learn to delegate more and better.

- **2. How to delegate? Set expectations.** Communicate, set time frames and goals, and get out of the way. People need to know what it is you expect. What does the outcome look like? When do you need it by? What's the budget? What resources do they get? What decisions can they make? Do you want checkpoints along the way? How will we both know and measure how well the task is done? One of the most common problems with delegation is incomplete or cryptic up-front communication leading to frustration, a job not well done the first time, rework, and a reluctance to delegate next time. Poor communicators always have to take more time managing because of rework. Analyze recent projects that went well and didn't go well. How did you delegate? Too much? Not enough? Unwanted pieces? Major chunks of responsibility? Workload distributed properly? Did you set measures? Overmanage or abdicate? Find out what your best practices are. Set up a series of delegation practices that can be used as if you're not there. What do you have to be informed of? What feedback loops can people use for mid-course correction? What questions should be answered as the work proceeds? What steps should be followed? What are the criteria to be followed? When will you be available to help? *More help?* – See #27 *Informing* and #35 *Managing and Measuring Work*.
  
- **3. Providing the right amount of detail? Communicate the what and the why, leave the how up to them.** The best delegators are crystal clear on what and when, and more open on how. People are more motivated when they can determine the how for themselves. Inexperienced delegators include the hows which turns the people into task automatons instead of an empowered and energized staff. Tell them what and when and for how long and let them figure out how on their own. Give them leeway. Encourage them to try things. Besides being more motivating, it's also more developmental for them. Add the larger context. Although it is not necessary to get the task done, people are more motivated when they know where this task fits in the bigger picture. Take three extra minutes and tell them why this task needs to be done, where it fits in the grander scheme and its importance to the goals and objectives of the unit.
  
- **4. What to delegate? Figure out the best things to delegate.** Delegate as much as you can along with the authority to do it. Delegate more whole tasks than pieces and parts. People are more motivated by complete tasks. Delegate those things that others can do. Delegate those things that are not things you do well. Delegate tactical; keep strategic. Delegate short term; keep long term. One simple and effective way is to ask your people: "What do I do that you could help me with? What do I do that you could do with a little help from me? What do I do that you could do by yourself? What do you do that I could do faster and more effectively (re-delegation)?" You certainly won't agree to everything, but if you are now a poor delegator, they will help you improve by 50%. Pick one or a few things each time and let go.
  
- **5. Delegate to whom? Delegate to people who can be successful.** To those who can do it and those who can almost do it! The most common Catch-22 we hear from managers is that they can't delegate

because their people are not good enough; they can't do the work. We ask, why is that? They say, because they inherited a weak staff from the previous manager. We say, why don't you get rid of the worst and get better people? They say they can't fire anyone because HR and Legal won't let them. (We ask HR and Legal if that's the case. They generally say no, as long as it's done properly.) Or they say they can't afford to have a position open at this time because there is so much to do. We say, but if they are truly poor performers, what's the difference? You can't and shouldn't delegate to poor performers unless it's for their development and motivation. On the other hand, you'll never get out of your bind until you bite the bullet and start releasing the poorest and replacing them with better. Read Covey's (*The Seven Habits of Highly Effective People*) point on sharpening your saw. A person comes upon a lumberjack sawing a large tree with a handsaw. He is sweating and breathing hard. It's going very, very slowly. The person asks why it's going so poorly. The lumberjack says because his saw isn't sharp. The person asks why he doesn't stop and sharpen the saw. The lumberjack says because there is no time. If your saws (direct reports) aren't sharp enough, switch to more of a teacher role. What are the first things you would tell them to help think about their work more productively, and to think about tasks as you think about them? Always explain your thinking. The role of a coach/teacher is to teach someone how to think/act as you do. Giving them solutions will make the person dependent at best. You may have to bubble your thinking to the surface first. To do this, work out loud with them on a task. What do you see as important? How do you know? What mental questions are you asking? What steps are you following? Why is this solution better than others? *More help? – See #13 Confronting Direct Reports and #25 Hiring and Staffing.*

- **6. Delegate for how long? Give a realistic time frame.** Allow more time than it would take you. Another common problem is that managers delegate and set time limits based upon their own capabilities and history. For many things, it is probably true that the manager could do the task faster and better. Remember when you started to learn how to do this task. How long did it take you? How did you feel about someone looking over your shoulder? Always allow more time in the schedule than it would take you to do it. Get the person to whom you are delegating to help you set a realistic time schedule. When you are going to delegate, start earlier in the project than you do now. *More help? – See #47 Planning.*
  
- **7. How much to delegate? Make the task fit the performer.** All of your people have differing skills and capacities. Good delegators match the size and complexity of the delegated task with the capacity of each person. Delegation is not an equal, one size fits all, activity. Equal opportunity delegators are not as successful as equitable delegators. Most people prefer stretching tasks to those they could do in their sleep; so it's OK to give each person a task slightly bigger than his/her current capabilities might dictate. Engage each person in the sizing task. Ask them. Most will select wisely. *More help? – See #56 Sizing Up People.*

- **8. Micromanaging? Monitor rather than obsess over delegated tasks.** Do you micromanage? If you're constantly looking over shoulders, you're not delegating. A properly communicated and delegated task doesn't need to be monitored. If you must monitor, set time-definite checkpoints by the calendar—every Monday; by percentage—after each 10% is complete; or by outcome—such as when you have the first draft. Be approachable for help, but not intrusive. Intervene only when agreed upon criteria are not being followed, or expectations are not being met. This focuses on the task, not the person. Let people finish their work.
  
- **9. Want to develop people? Delegate for development.** People grow by being assigned stretching complete tasks that contain elements they have not done before. Seventy percent of development in successful managers comes from doing stretch tasks and jobs. One bind of the poor delegator—my people aren't good enough—won't be solved until they are good enough. Doing most of the work yourself is a poor long-term development strategy and will never solve the problem.
  
- **10. Why aren't you delegating? Analyze what may be holding you back from delegating.** Are you hanging on to too much? Are you a perfectionist, wanting everything to be just so? Do you have unrealistic expectations of others? Someone made you leader because you are probably better at doing what the team does than some or most of the members. Do you feel guilty handing out tough work to do? Do you keep it yourself because you feel bad about giving them too much work? They would have to stay late or work on weekends to get it done. Most people enjoy being busy and on the move. If you think the workload is too much, ask. *More help? – See #36 Motivating Others.* Don't want to take the risk? If they don't perform, it will reflect on you. Poor delegation reflects on you, too. Are you really a personal contributor dressed in supervisor's clothes? Really prefer doing it yourself? People just get in the way? You need to examine whether management is the right career path for you. *More help? – See #6 Career Ambition.*

### Section 3: Learning from Feedback

*These sources would give you the most accurate and detailed feedback on your skill(s).*

- **1. Direct Boss**

Your direct boss has important information about you, your performance, and your prospects. The challenge is to get this information. There are formal processes (e.g., performance appraisals). There are day-to-day opportunities. To help, signal your boss that you want and can handle direct and timely feedback. Many bosses have trouble giving feedback, so you will have to work at it over a period of time.

## 2. Direct Reports

Across a variety of settings, your direct reports probably see you the most. They are the recipients of most of your managerial behaviors. They know your work. They can compare you with former bosses. Since they may hesitate to give you negative feedback, you have to set the atmosphere to make it easier for them. You have to ask.

## 3. Past Associates/Constituencies

When confronted with a present performance problem, some claim, “I wasn’t like that before; it must be the current situation.” When feedback is available from former associates, about 50% support that claim. In the other half of the cases, the people were like that before and probably didn’t know it. It sometimes makes sense to access the past to clearly see the present.

## 4. Peers and Colleagues

Peers and colleagues have a special social and working relationship. They attend staff meetings together, share private views, get feedback from the same boss, travel together, and are knowledgeable about each other’s work. You perhaps let your guard down more around peers and act more like yourself. They can be a valuable source of feedback.

## Section 4: Learning from Develop-in-Place Assignments

*These part-time develop-in-place assignments will help you build your skill(s).*

- Manage something “remote,” away from your location.
- Create employee involvement teams.
- Assign a project with a tight deadline to a group.
- Manage a temporary group of “green,” inexperienced people as their coach, teacher, guide, mentor, etc.
- Manage a group of resistant people with low morale through an unpopular change or project.
- Manage a group of low-competence or low-performing people through a task they couldn’t do by themselves.
- Manage a group that includes former peers to accomplish a task.
- Manage a group of people who are older and/or more experienced to accomplish a task.
- Manage a group of people where you are a towering expert and the people in the group are not.
- Build a multifunctional project team to tackle a common business issue or problem.

## Section 5: Learning from Full-Time Jobs

*These full-time jobs offer the opportunity to build your skill(s).*

### □ 1. Fix-Its/Turnarounds

The core demands to qualify as a Fix-it or Turnaround assignment are: (1) Clean-ing up a mess. (2) Serious people issues/problems like credibility/performance/morale. (3) Tight deadline. (4) Serious business performance failure. (5) Last chance to fix. Four types of Fix-its/Turnarounds: (1) Fixing a failed business/unit involving taking control, stopping losses, managing damage, planning the turnaround, dealing with people problems, installing new processes and systems, and rebuilding the spirit and performance of the unit. (2) Managing sizable disasters like mishandled labor negotiations and strikes, thefts, history of significant business losses, poor staff, failed leadership, hidden problems, fraud, public relations nightmares, etc. (3) Significant reorganization and restructuring (e.g., stabilizing the business, re-forming unit, introducing new systems, making people changes, resetting strategy and tactics). (4) Significant system/process breakdown (e.g., MIS, financial coordination processes, audits, standards, etc.) across units requiring working from a distant position to change something, providing advice and counsel, and installing or implementing a major process improvement or system change outside your own unit and/or with customers outside the organization.

### □ 2. Scale Assignments

Core requirements to qualify as a Scale (size) shift assignment are: (1) Sizable jump/shift in the size of the job in areas like number of people, number of layers in organization, size of budget, number of locations, volume of activity, tightness of deadlines. (2) Medium to low complexity; mostly repetitive and routine processes and procedures. (3) Stable staff and business. (4) Stable operations. (5) Often slow, steady growth. Examples of Scale assignments would be: (1) Managing one function for entire enterprise. (2) Responsibility for one product area or one geography that is expanding. (3) Leading an enterprise-wide project. (4) Moving from district to regional manager.

### □ 3. Significant People Demands

Core demands required to qualify as a Significant People Demands assignment are: (1) A sizable increase in either the number of people managed and/or the complexity of the challenges involved. (2) Longer-term assignment (two or more years). (3) Quality of people management is critical to achieving results. (4) Involves groups not worked with before (e.g., union, new technical areas, nationalities). Examples of Significant People Demands jobs would be: (1) Downsizing a department—making staff changes. (2) Leading an organization through a reorganization or restructuring. (3) Managing a newly merged business unit comprised of people from disparate units/cultures. (4) Rebuilding a team that has a history of conflict or hardship. (5) Mentoring and coaching inexperienced people. (6) Leading geographically distributed teams.

(7) Absorbing a new team/unit into an existing structure. (8) Leading a company or function with a rapidly growing employee base.

#### 4. Start-Ups

The core demands to qualify as a start from scratch are: (1) Starting something new for you and/or for the organization. (2) Forging a new team. (3) Creating new systems/facilities/staffs/programs/procedures. (4) Contextual adversity (e.g., uncertainty, government regulation, unions, difficult environment). Seven types of start from scratches: (1) Planning, building, hiring, and managing (e.g., building a new facility, opening up a new location, moving a unit or company). (2) Heading something new (e.g., new product, new service, new line of business, new department/function, major new program). (3) Taking over a group/product/service/program that had existed for less than a year and was off to a fast start. (4) Establishing overseas operations. (5) Implementing major new designs for existing systems. (6) Moving a successful program from one unit to another. (7) Installing a new organization-wide process as a full-time job like Total Work Systems (e.g., TQM/ISO/Six Sigma).

## Section 6: Learning from Your Plan

*These additional remedies will help make this development plan more effective for you.*

### Learning to Learn Better

#### 1. Study Yourself in Detail

Study your likes and dislikes because they can drive a lot of your thinking, judging, and acting. Ask which like or dislike has gotten in the way or prevented you from moving to a higher level of learning. Are your likes and dislikes really important to you or have you just gone on “autopilot”? Try to address and understand a blocking dislike and change it.

### Learning from Experience, Feedback, and Other People

#### 2. Being a Student of Others

While many of us rely on others for information or advice, we do not really study the behavior of other people. Ask what a person does exceptionally well or poorly. What behaviors are particularly effective and ineffective for them? What works for them and what doesn't? As a student of others, you can deduce the rules of thumb for effective and ineffective behavior and include those in your own library. In comparing yourself with this person, in what areas could you most improve? What could you specifically do to improve in ways comfortable for you?



### 3. Learning from Bosses

Bosses can be an excellent and ready source for learning. All bosses do some things exceptionally well and other things poorly. Distance your feelings from the boss/direct report relationship and study things that work and things that don't work for your boss. What would you have done? What could you use and what should you avoid?

### 4. Learning from Interviewing Others

Interview others. Ask not only what they do, but how and why they do it. What do they think are the rules of thumb they are following? Where did they learn the behaviors? How do they keep them current? How do they monitor the effect they have on others?

### 5. Learning from Remote Models

Many times you can learn from people not directly available to you. You can read a book about them, watch tapes of public figures, read analyses of them, etc. The principles of learning are the same. Ask yourself what they do well or poorly and deduce their rules of thumb.

### 6. Consolidating What You Learn from People

After using any source and/or method of learning from others, write down or mentally note the new rules of thumb and the principles involved. How will you remind yourself of the new behaviors in similar situations? How will you prevent yourself from reacting on "autopilot"? How could you share what you have learned from others?

### 7. Getting Feedback from Direct Reports

Direct reports often fear reprisals for giving negative feedback about bosses, whether in a formal process, like a questionnaire, or informally and face-to-face. Even with a guarantee of confidentiality, some are still hesitant. If you want feedback from direct reports, you have to set a positive tone and never act out of revenge.

### 8. Openness to Feedback

Nothing discourages feedback more than defensiveness, resistance, irritation, and excuses. People don't like giving feedback anyway, and much less to those who don't listen or are unreceptive. To help the feedback giver, be open, listen, ask for examples and details, take notes, keep a journal, and thank them for their interest.

## □ 9. Learning from Limited Staff

Most managers either inherit or hire staff from time to time who are inexperienced, incompetent, not up to the task, resistant, or dispirited. Any of these may create a hardship for you. The lessons to be learned are how to get things done with limited resources and how to fix the people situation. In the short term, this hardship is best addressed by assessing the combined strengths of the team and deploying the best you have against the problem. Almost everyone can do something well. Also, the team can contribute more than the combined individuals can. How can you empower and motivate the team? If you hired the troublesome staff, why did you err? What can you learn from your hiring mistakes? What wasn't there that you thought was present? What led you astray? How can you prevent that same hiring error in the future? What do you need to do to fix the situation? Quick development? Start over? If you inherited the problem, how can you fix it? Can you implement a program of accelerated development? Do you have to start over and get new people? What did the prior manager do or not do that led to this situation in the first place? What can you learn from that? What will you do differently? How does the staff feel? What can you learn from their frustrations over not being able to do the job? How can you be a positive force under negative circumstances? How can you rally them to perform? What lasting lessons can you learn from someone in distress and trouble? If you're going to try accelerated development, how can you get a quick assessment? How can you give the staff motivating feedback? How can you construct and implement development plans that will work? How can you get people on-line feedback for maximum growth? Do you know when to stop trying and start over? If you're going to turn over some staff, how can you do it both rapidly and with the least damage? How can you deliver the message in a constructive way? What can you learn from having to take negative actions against people? How can you prevent this from happening again?

## Learning from Courses

### □ 10. Supervisory Courses

Most new supervisors go through an "Introduction to Supervision" type course. They are designed to teach the common practices a first-line supervisor needs to know to be effective. The content of most of those courses is standard. There is general agreement on the principles of effective supervision. There are two common problems: (1) Do the students have a strong motivation to learn? Do they know what they don't know? Is there any pain? Because motivated students with a need for the knowledge learn best, participants should have had some trying experiences and some supervisory pain and hardships before attending. (2) Are the instructors experienced supervisors? Have they practiced what they preach? Can they share powerful anecdotes to make key points? Can they answer questions credibly? If possible, select supervisory courses based on the instructors, since the content seems to be much the same for all such courses. Lastly, does the course offer the opportunity for practicing each skill? Does it contain simulations? Are there case studies you could easily identify with? Are there breakout groups? Is there opportunity for action learning? Search for the most interactive course.

*Delegating work works, provided the one delegating works, too.* Robert Half – American businessman

## Suggested Readings

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