

COACHING *for* LEADERS

Effective Delegation of Authority: A (Really) Short Book for New Managers About How to Delegate Work Using a Simple Delegation Process

by Hassan Osman

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Dave's Reading Highlights

One of the main reasons why new managers don't delegate the right way is because they don't think through the tasks that they're going to assign ahead of time.

Before saying anything to your employee, you should first think about what you want. This may sound obvious, but many new managers make the mistake of starting a delegation discussion with their employees while they're still in brainstorming mode.

New managers usually make the mistake of assuming that their team members have equal strengths, but, of course, that's not true. You should put some thought into finding the right person-role fit, which measures the harmony between an individual and the role they're assigned to.

Whatever you do, don't send an email as a first step, especially when you're first starting out as a manager. Emails are very transactional modes of communication and do not give you a good sense of whether your subordinate fully grasps the task.

Don't wait until the end of the task description to verify your employee's understanding. Instead, a best practice is to continuously ask questions such as: "Does this make sense?" or "This might have been too fast. Shall I repeat it back to you?" so that you make it more comfortable for them to confirm that they understand you.

Another common mistake that new managers usually make is that they get very detailed with their task assignments. The key is to describe goals and not specific actions during your delegation process.

The first tip is to avoid being too prescriptive in your task assignment. You can do this by focusing on the objectives and not the process itself. In other words, focus on the what and not the how.

Another common issue with delegation is that managers are usually not very specific about a deadline for a task. You should give a clear timeline to your subordinate because that will minimize confusion and motivate them to get things done.

The second tip is to schedule intermediate checkpoints to connect with your subordinate and ensure that things are going well. These are basically meetings to go over the work that has been accomplished up to that point.

This makes it all the more important to set clear, detailed limits which your subordinate can use to inform their decisions. Here's an example about setting clear limits that might aid you in making your own. Guideline A: "The budget for this project is \$4,700." Guideline B: "The budget for this project is \$4,700. You are free to use this money at your discretion for reasonable purchases without asking me first. However, when you use up the first \$2,000, I'd like to do a quick review of the expenses with you before the rest of the budget is used up." Guideline A has no clear limits on how the budget can be used, whereas guideline B is a lot clearer with defined boundaries on what those limits are. So the idea here is to use verbiage that sets clear limits on your employee's level of authority.

Hi Sarah, Thanks for meeting with me today. Here's a recap of what we discussed on the call regarding the task I need your help with.

Task Description Please complete the attached PowerPoint slides for our monthly senior leadership meeting. There are four slides that must be updated—slides 3, 5, 7, and 9, which include our projections and headcount numbers. The rest of the slides do not need to be updated. To get the data required for those four slides, you'll need to run the analysis in the financial Excel file (also attached) by updating it with the right information which you can get from John on the 3rd of every month. I'll also need that updated Excel file. Please do not change the format of the PowerPoint slides or Excel file because those are standard templates.

Main Goal Your success means that you'll send me two files that are ready for me to share on the senior leadership call without having to double-check the financial information. This assignment will give you the chance to see the details of our business, and you'll learn how big decisions are made based on those details.

Timeline The hard deadline for sending me both files is July 16 by 3pm US Eastern Time. However, please aim to get this done by close of business on July 15 and send the files to me that evening so I have the chance to review. I'd also like to schedule a checkpoint on July 8 at 2pm US Eastern Time to make sure all is going well and give you a chance to answer any questions you may have. During the checkpoint and after the task is over, I'll share feedback with you on what went well and what can be improved so that we can both learn how we can get better.

Authority Level You can ask any team member from our business unit for help on data for the deck and file without running it by me first. However, if you'd like to involve resources from a different organization, please let me know before you reach out to them so that I make sure you get the information from the right business unit. Also, if you need to decide on something and you're unsure what to do, please reach out. To save time and make sure I can help you effectively, please follow these steps before scheduling some time with me: Think through potential options Come up with a recommendation Explain why that recommendation is best

Additional Materials Attached is the PowerPoint deck and Excel file from last month to use as templates. I also included the WebEx recording of our demo should you need it

for reference. Thanks again for your help. This will be a great developmental opportunity for you and I'm sure you'll do great. Keep in mind that this is a learning process for both of us, and it's okay to make mistakes! Best, Hassan

Use the checkpoints you scheduled earlier and make sure you are fully attentive during those calls. It's crucial to show your employee that you're vested in their success and are focused on what they have to say.

It's likely you and your subordinate will face some issues throughout this delegation process. If you do, then be patient and don't get too frustrated. Mistakes will happen, and you will have to factor them in. You don't want to rush to judgment. Instead, focus on solving the problem with your subordinate. A great best practice is to give them feedback that allows them to fix their own mistakes by asking them non-probing questions such as: "How do you think we can solve this?" or "How do we avoid this from happening going forward?" The idea is to solve the problem with them instead of for them.