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Jim Boomer • May. 27, 2013

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Delegation is an important tool to help free up time, allowing us to focus on the things we do best and that add the most value to the firm. Unfortunately, however, delegation is a tool that too infrequently makes it out of the toolbox.

There are a number of common preconceived notions regarding delegation. Examples include that a person often believes that they are the only one who can accomplish a given task, that they are the only one who can do it right, that everyone else is so busy that there is no one to delegate to, and/or that they would spend or waste just as much time giving directions as they would had they gutted through on their own. While these are sometimes valid concerns, each can be overcome.

Five Steps to Effective Delegation

Upfront thinking and planning can greatly increase the chance that an offloaded task will be completed successfully and to everyone's satisfaction.

Five Steps to Effective Delegation	
1. Select the Right Person	Match personnel skills and abilities with the task based on aptitude, not simply on convenience.
2. Specify the Desired Result	Communicate clearly the result you expect, and specify what

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	personnel understand their authority level. [Note: There is nothing more frustrating for a delegatee than feeling they have been given responsibility <i>and</i> authority only to find out later in the process that the only “correct” approach is the one the delegator would have taken.]
5. Track Progress and Results	Set up a mechanism for the delegatee(s) to report progress and communicate issues.

Communication is Key

Tasks and decision-making responsibilities are delegated at all levels of the firm. All too often, however, the delegator is ultimately not completely satisfied with either: 1) the final result or 2) the way in which the result was achieved. More often than not, such dissatisfaction stems from a breakdown in the communication process. The delegator must clearly communicate expectations, criteria, and level of authority from the onset. To effectively communicate expectations and criteria, a delegator must first determine the level of authority they are willing to bestow upon any delegatee.

- **Level 1**—Delegator wants delegatee to simply assess and research the task/decision

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Delegation Do's & Don'ts

Following these delegation process guidelines can also help increase the likelihood of success.

Do's.

- **Constantly Update Priorities**—Any delegatee must be helped to understand the importance of the task/decision they have been asked to carry out. They must also understand if and when that importance level changes.
- **Clarify Your Expectations**—Once again, outline early on what the finished product should look like when it is done well.
- **Provide Support to the Delegatee**—Providing feedback, acting as a sounding board, and answering questions can all help ensure success.
- **Communicate, Communicate, Communicate**—Clear communication about expectations, criteria, timelines, and authority level are all key to delegation process success.

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together come up with realistic timelines to help ensure that all parties are committed to those deadlines.

- **Micromanage**—Authority level will determine how closely you need to manage the delegatee. This level should be clearly communicated early on so there are no surprises at any point in time.
- **Delegate Your Unique Abilities**—Unique abilities are the things that you do best and enjoy doing. They are also the things that typically add the most value to the firm, things that should never be delegated!

The bottom line is this: Whether your focus is technology or management, delegation is a tool that can help you—and the firm—become more effective, more successful, overall.

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