

Effective Delegation Process

There is effective delegation, and there is “rubber band” delegation: when we delegate something and it snaps back to us. Here’s a process that our clients find helps them to end rubber band delegation, and increase ownership and accountability.

1. What are the capabilities (skills required) for a given project/task?
2. Check on a person’s capacity (do they have time) and capability (do they have the ability/skills to do the task). Match the person with the project. They are now called the “Owner.”
3. Explain the project/task you want the Owner to do, and check in to make sure clear communication has occurred. Say “I would like to increase the clarity of my communication. So could you please echo back to me what you understood so I may ensure I communicated clearly?” Let the Owner echo back what they heard, clarifying gaps and adding whatever may have been missed, paying careful attention to the specifics of what the deliverable is, exact due date and times.
4. Now ask how the Owner would like to ensure they get results—what is their plan? Use the Outcome Frame and Decision Framework below to help them form a success plan.
5. Have the Owner track the delegated task via Basecamp, Trello, your Weekly Status template, whatever method you use. Ensure you have a structure in place so communication is honest when a project/task needs to be rescheduled or deadline renegotiated. Most of our clients find dividing a complex project into a series of smaller projects increases visibility, and ensures that weekly deadlines keep momentum. Then if a deadline needs to be moved the impact isn’t as severe, since the deliverable is much smaller. Set a standard for renegotiation when a deadline will be missed. Most of our clients have a 48-72 hour advance notice when it appears a deadline is in peril.

Outcome Frame – 6 Step Version

What would you like? (outcome desired)

What will having that do for you? (how they’ll feel/benefits)

How will you know when you have it? (proof/criteria)

Where, when, with whom do you want this? (timing/who else/scope)

What of value might you risk/lose to get this? What side effects might occur? (is it ok to have this?)

What are your next steps (get into action)?

Decision Framework

It's essential as leaders to ensure that we distribute decision making to our team. This fosters ownership and reduces the likelihood of the order giver-order taker dynamic—which crushes the spirit of ownership, innovation, and a feeling of empowerment.

Here's a decision framework our clients like. Edit it (as we recommend you do with all of our resources) to serve your needs best.

1. Define problem/situation to be addressed and who owner/decision maker truly is – is this MY decision to make or can I just be a consultant/strategist to the decision maker? If not you, enroll the decision maker to complete the following steps.
2. Determine desired outcome/result – use the Outcome Frame to inquire and distill the true desired result.
3. Perform decision due diligence: what is the timeline, research required, budget impact, departments/products/people who will/may be impacted. For very simple decisions you'll zoom through this step very quickly.
4. Determine who will own the outcome being successful/who will implement it? This should be clear from the Outcome Frame. Enroll them and ensure clear communication.
5. Determine who will monitor the success post-decision. Assign them, noting they may be different from person in #4—they will likely be the decision maker in #1 above.

Why Delegation Fails

Often delegation fails simply because we didn't follow the processes above. Here are some additional questions to consider:

Are we building/increasing capabilities in our people so they can take on more projects? (You'll want to include the specifics in the person's Individual Development Plan.)

Do we need to create more safety, belonging, mattering in our culture, so it's OK to be an Owner?