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Workbook

Manager Essentials: Effective Delegation

The best managers know that they can't do everything themselves. The key to success? Learning to let go of some tasks and trusting your team to get the job done.

As Jesse Sostrin writes in the *Harvard Business Review*, "The upper limit of what's possible will increase only with each collaborator you empower to contribute their best work to your shared priorities. Likewise, your power decreases with every initiative you unnecessarily hold on to."

Like any other skill, it takes time and practice to get comfortable with delegation. This worksheet will help you take concrete steps to improve your ability to delegate.

A **4-step** approach to delegation

There are countless ways you could approach delegation, but for the sake of simplicity, we've narrowed it down to four steps. Read through each step and take some time to think through your answers to the prompts. By completing these prompts, you're building an action plan to strengthen your delegation skills

1.

Determine WHAT

The first step is to understand which tasks to delegate and which tasks to own. You can't just assign things at random to your team — your approach should be intentional. Consider how you're currently spending your time. Now think about what changes you can make that will have the most impact.

✏️ Write down your daily, weekly, and monthly tasks. Make a note of which of these tasks take up more of your time than they should. Those are the tasks to delegate to your reports.

✏️ Now, note the projects and tasks you'd finally have the bandwidth to focus on after freeing up your time through delegation.

2.

Clarify WHY

After you've identified delegation opportunities, think about why the task matters to achieve your team's goals. Can you articulate how this task fits into the bigger picture? For example, gathering data for weekly updates might seem mundane to an employee new to the task. But it's critical to the success of the team, as it allows your team to communicate their impact to leadership and is an essential part of creating a data-driven culture. Explaining the "why" of tasks helps employees understand how these new assignments will strengthen their career paths.

✏️ Look at the tasks you identified in 'Step 1: Determine WHAT' to delegate to team members. Describe how these tasks fit into the big picture of your team's goals. This is how you'll articulate the WHY when assigning the tasks to others.

✏️ Identify the WHY for the tasks and projects that you'll finally have time to tackle. If you have difficulty identifying the WHY for a task, ask yourself if that's what you should be spending your time on.
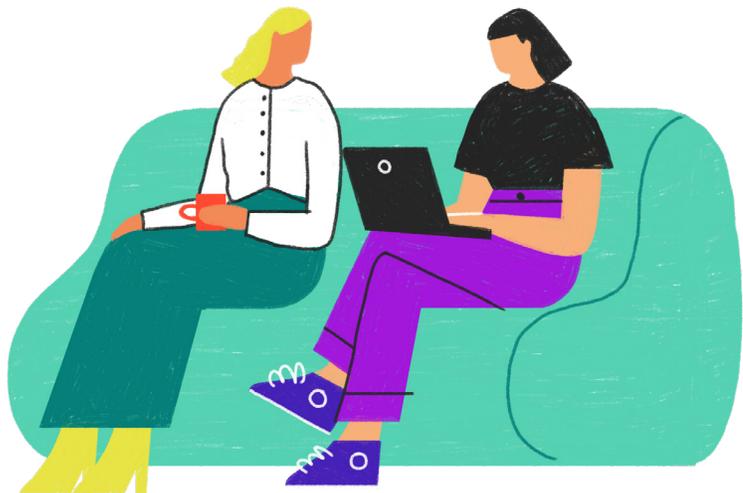
3.

Identify WHO

Now that you have a sense of which tasks to delegate and why, it's time to find the right people to assign them to. Keep in mind that this may involve encouraging some of your direct reports to work outside of their comfort zone. Make sure they know you'll continue to support them, and you're not expecting perfection.

✎ Consider your team's near- and long-term career goals; what skills do they need to master to reach those goals? Now, make a list of your team members and note which new tasks or projects will help them achieve those goals.

✎ Work with each team member to evaluate where they might need to upskill to accomplish these tasks. Make a learning plan that helps employees feel empowered and confident in taking on new opportunities.

4.

Establish HOW

Finally, you want to work with your team members to create an action plan. What, exactly, are you asking them to do? What's the desired outcome, timeline, and frequency of the task? When building action plans with your employees, also consider whether your employee will need support, direction, or both in order to be successful.

How will you track employee progress on delegated tasks? List the project management tools or processes you'll use to stay updated on project statuses. This allows you to focus your time with employees on more meaningful conversations, rather than status updates.

Take on a coaching mindset during your 1:1s with employees taking on new projects. List three questions you can ask to ensure that the team member is heading in the right direction with the project.

Empowered managers are the key to company success

Delegation is the key to working smarter — and it leads to tangible results. In fact, CEOs who excel in delegating generate 33% higher revenue. Imagine the effects on your bottom line if managers at every level were empowered to delegate.

Need a little extra support with your manager training? Talk to our learning experts for more solutions on developing managers who will influence your company's long-term success.

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