



Episode 59: A Framework for Delegating Effectively

Welcome to In the Right Direction podcast, where we believe you get to choose what's on your plate, you can manage the overwhelm, and that change is possible. I'm your host, Deb Elbaum, and I'm here to share insights and strategies to increase your happiness, one baby step at a time. Let's dive in.

Hi everyone, it's Deb. Today, let's talk about the skill of delegating. Delegating is one of those topics that comes up often in coaching, because many of my clients want to delegate more. They know that delegating helps other people develop and grow, and they know that delegating would allow them to have more time and space to put toward work that's a better use of their time.

Knowing that delegating is helpful and important is one thing; feeling confident and having a process to delegate effectively is another.

While the "why" of delegating is clear; it's the "how" and "who" where people get stuck. That's when emotions and fears surface, and thinking gets more muddled.

As a coach, I hear different explanations of what keeps people from delegating. They tell me things like:

"Everyone else on my team is busy, too, so I can't give them more work to do."

"It would be quicker for me to do the task myself than taking the time to explain it to someone else."

"No one has the knowledge or history that I have. I'm the only one who knows this."

Do any of those sound familiar?

Delegating is a leadership skill, and like many other leadership abilities, it's one that's honed over time. It's learned by doing. People's delegating competency is also often informed by their personal past experiences of being delegated to.

They might have appreciated how a former boss delegated work to them, and they want to emulate that. Or they might have experiences that didn't go so well, and they're determined to do something else as a leader.

Past experiences provide helpful data as we choose our way forward, and it's also helpful to have a framework to bring more structure to the process.

Today, I'll share one framework to consider and use as you think about delegating. My hope is that these ideas help you have more clarity and confidence so that you can delegate more easily, confidently, and effectively.

Let's start by having you think about these questions: Who do you usually delegate to? What is your process for choosing a person for a specific task? And how do you know how much freedom to give the person?

Delegating takes preparation, and the preparation is thinking. Taking time to think about who your people are for delegating work to, the work itself, and the support the person needs is imperative. The

clearer you are in your mind about your process and approach, the easier it will be to have your delegation conversation and set clear expectations and accountability.

The trouble with how people often delegate is that they fall back on old habits and biases. They might choose the person they know best to delegate everything to. Or they might give everyone the same amount of freedom with a task – and then get upset when some people fail to follow through as expected.

Today's framework is helpful because it brings more objectivity to delegating. It's a way to separately consider both the task and the person. When you have clarity around these pieces, you can then have a more productive delegation conversation.

This framework invites a mindset shift around delegating. The big idea today is that delegating is about fit. Fitting a person with a task. When we approach delegating from fit, it then becomes about what a person needs in order to accomplish a task they've been given. Being in a mindset of fit also allows you, the leader, to tailor how you approach the conversation and accountability given the needs of the person and the task.

Because delegating is situational. Every situation – each time you delegate – can be different.

To delegate most effectively, it's helpful to consider both the task and the person you're delegating to.

The first step in this framework is to assess the task. We do this by thinking about the task at hand and how urgent, important, and difficult it is.

One way to do this is to ask yourself, on a scale of 1 to 10, with 1 being not very and 10 being extremely, how urgent is this task? How important is it? How difficult is it? Knowing these things will help guide your delegation conversation later on. For example, if a task is very urgent, you'll likely emphasize that in your conversation. If it's a complex task, you'll want to make time in your delegation conversation to provide resources and information.

Step 1 is to understand the task. Step 2 is to understand the person you're delegating to.

For this, you're going to consider two different factors. These are the person's eagerness and ability. Someone's eagerness means how much they want to do the task, how excited they are about it, how enthusiastic they seem. People with low eagerness seem reluctant to do a task; people with high eagerness are raising their hand and asking for the work.

The second factor is the person's ability to do this particular task at this time. Do they have the knowledge and skill set to accomplish this task? Have they done it before? Do they know the process?

For some tasks, a person might be a novice. For other tasks, a person might have the experience necessary. As you think about the person you want to delegate to, consider their level of eagerness and ability for this specific task. Having clarity about these factors is key, because it will then help you tailor your delegation approach.

Delegating to someone who has high eagerness and high ability for this situation will feel and sound different than when you delegate a task to someone who is lower in these.

Think about it – when you delegate a task to someone who knows what they’re doing and is ready to go, you’re able to coach more. You likely ask them how they plan to go about the work. You give them more freedom so they can feel empowered.

On the other hand, when you delegate to someone who is a novice or who lacks the experience, you’ll want to have a different conversation. If someone doesn’t yet have the skills needed for the task, you’ll be more directive. You’ll be in teaching mode and have check-ins at more frequent intervals to make sure the learning is happening.

When someone is in the low eagerness category, that’s a big opportunity to bring curiosity. It’s important to remember that this person might have other things going on outside of work. They might have too much on their plate already, or maybe they’re worried about disappointing you.

This is when it’s important to take time to get curious and ask questions – like, what would make the project more interesting for you? What else is going on for you? It’s also the time to remember to bring lots of gratitude and appreciation.

After you’ve assessed the task and person’s readiness, you’ll have your delegation conversation. You will give instructions, parameters, guidelines, and discuss accountability and follow up. Given the needs you’ve identified, you’ll be able to tailor this conversation more productively and know where to be directive and where to give more freedom.

I hope that as you’ve been listening to today’s podcast, your brain is already thinking about some delegation opportunities in front of you.

So let’s do a quick recap with the big ideas from today.

Big idea #1: Delegating is an important opportunity for everyone involved, and to do it well, it takes thinking and preparing.

Big idea #2: Delegating is situational. It’s important to assess the task and how urgent important, and difficult it is.

Big idea #3: It’s important to assess the person’s abilities to do the task at hand.

Delegating is an opportunity to create the right fit for the situation. Given the task and the person, think about the conversation you need to have so that there is confidence and clarity all around. Think about how detailed to get with the instructions, how much freedom is appropriate, and what accountability will be most helpful.

The clearer you can be for yourself and in your communication with the person you’re delegating to, the more everyone will benefit. Clear expectations are not only kind, they are necessary for people’s productivity, focus, and success.

Thank you so much for listening and being part of my community. If you would like help delegating more effectively, please reach out. Email me at deb@debelbaum.com or go to my website debelbaum.com to schedule a consult. I look forward to it. I’m here to help you create your best self at home and at work, so that you’re confident you’re moving in the right direction for you.

Until next time!